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ABSTRACT

This task analysis guide is designed to be used in combination with the "Health Occupations Education Service Area Resource" in order to implement competency-based education in the Medical Assistant program in Virginia. The task analysis guide contains the task inventory, suggested task sequence lists, and content outlines for the specific courses in medical assisting. Section 1 of this publication contains a validated task inventory for medical assistant. For each task, applicable information pertaining to performance and enabling objectives, criterion-referenced measures, and suggested instructional activities and aids is provided. Section 2 provides a description of the Medical Assistant program, descriptions of the courses, task sequence lists that provide a suggested order of the task inventory for actual course instruction, and course content outlines. The instructional topics within the course content outlines have been cross-referenced with corresponding task/competency codes from the task inventory in Section 1. A reference list is included in the guide. (KC)

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GUIDE APPLICATION

This document is useful in developing and selecting instructional materials and in implementing competency-based education for the following program and courses:

Medical Assistant (CIP 17.0503)
Medical Assistant I (8345)
Medical Assistant II (8346)

Additional information concerning the application and use of this publication in planning and development may be obtained from the following:

Health Occupations Education Service
Department of Education
P.O. Box 6Q
Richmond, Virginia 23216
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TASK ANALYSES
FOR
MEDICAL ASSISTANT

Developed by

Newport News City Public Schools
Newport News, Virginia

and

Virginia Vocational Curriculum Center
Department of Vocational and Community Education
Henrico County Public Schools
Glen Allen, Virginia 23060

In cooperation with

Heath Occupations Education Service
Virginia Department of Education
Vocational and Adult Education
Richmond, Virginia 23216

FOREWORD

In the next decade, businesses and industries in Virginia will require large numbers of skilled workers. Therefore, vocational education at the secondary and postsecondary levels will have the responsibility of preparing individuals for a variety of occupations.

Competency-based education (CBE) provides the preparation students need for entry into the Virginia work force. The CBE practice of recording competencies developed by students helps them to make a smooth transition between secondary and postsecondary programs when both levels of education are required for career training. In addition, CBE is effective in retraining workers who have been displaced because of changing technology.

This guide will assist teachers and administrators in developing instructional materials that meet the needs of students and industry and comply with the Virginia CBE standards for vocational and adult education.

S. John Davis
Superintendent of Public Instruction

Dewey T. Oakley, Jr.
Administrative Director
Vocational and Adult Education

ACKNOWLEDGMENTS

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Dr. Kay B. Brown, Vocational Curriculum Development Supervisor, Virginia Department of Education, coordinated the final publication process. The organizational and editorial revisions necessary to prepare the manuscript for publication were performed by the Virginia Vocational Curriculum Center, administered by the Henrico County Public Schools, Department of Vocational and Community Education:

Flora C. Armstrong, Center Director
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Special recognition is given to the students of the Henrico Trade Center of the Henrico County Public Schools, Department of Vocational and Community Education. Under the supervision of William D. Burton, printing instructor, these students printed, assembled, packaged, and prepared the guide for distribution.

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INTRODUCTION

These task analyses are designed to be used in combination with the Health Occupations Education Service Area Resource in order to implement competency-based education in the Medical Assistant program. The service area resource contains information that pertains to all programs within the Health Occupations Education area; the sections of that publication are entitled Occupational Information, Student Organization (HOSA), Classroom Management Systems, and Recording Systems. This task analyses document contains the task inventory, suggested task sequence lists, and content outlines for the specific courses, Medical Assistant I and II. Detailed instructions for combined use of these two publications are contained within the service area resource.

Using the Task Analyses

Section 1 of this publication contains a validated task inventory for Medical Assistant. For each task, applicable information pertaining to performance and enabling objectives, criterion-referenced measures, and suggested instructional activities and aids is provided. In this section, tasks are arranged by worker duty area only, and no attempt has been made to sequence tasks in instructional order.

Section 2 provides a description of the Medical Assistant program. This is followed by descriptions of the Medical Assistant I and II courses, task sequence lists which provide a suggested order of the task inventory for actual course instruction, and course content outlines. The instructional topics within the course content outlines have been cross-referenced with corresponding task/competency codes from the task inventory in Section 1.

It is suggested that the Section 2 task sequence list and course content outline be reviewed initially to make any desired changes in sequencing of instruction. Once the sequencing is confirmed, instructional planning and implementation may proceed through referral to the Section 1 task/competency sheet noted beside each instructional topic within the outline.

SECTION 1

TASK INVENTORY

One of the major characteristics of competency-based education (CBE) is that the course content is based upon actual jobs or tasks performed by the worker. In Virginia the Department of Education has established standards for competency-based education. According to these standards, competencies must be role-relevant and based upon appropriate research. This standard states:

> Role-relevant competencies are identified and stated.
>
> The competencies, with standards, will be identified through V-TECS, IDECC, and other appropriate research. Advisory committees should be used to review competencies and standards. Competencies in the affective domain will be included. Role-relevant competencies for occupational preparation programs are those that specifically relate to the occupation for which the student is being prepared, as well as to the personal needs of the student. Role-relevant competencies are related also to orientation, exploration, and/or industrial arts experiences which have been identified for students.

Therefore, role-relevant jobs or tasks, called competencies in CBE, must be identified and validated before instructional materials are developed and subsequent instruction takes place. The task list in this document is based on the following:

1. Job titles and descriptions found in the Occupational Outlook Handbook and the Dictionary of Occupational Titles
2. Research into task lists from other states
3. The Vocational-Technical Consortium of States (V-TECS) catalog for Medical Assistant
4. Interviews with former students and incumbent workers in the health delivery system
5. Input from teachers and curriculum specialists
6. Suggestions from local craft advisory committee members.

Information collected and reviewed from these sources was used to develop an initial task list. The next step involved in preparing the final task inventory was validation of the task list. Validation is essential if the information collected is to be useful in operating CBE courses and programs. The validation process involved the following:

1. Review by writing team members to determine completeness of inventory
2. Review and validation by local craft advisory committee to ensure the role-relevance and completeness of the inventory
3. Review by selected incumbent workers in local and regional industry to determine the validity of the inventory
4. Final review and editing by writing team members, project directors, and state staff.

This process was used to determine content appropriate for the competency-based medical assistant courses at the secondary level. Therefore, instruction can logically be based on the validated task inventory included in this publication.

The task analyses sheets are arranged by duty areas for the specific domain covered by the guide. Information contained on each sheet is as follows:

1. The task/competency for a given duty area which is performed by incumbent workers
2. Program and course application information
3. Performance and enabling objectives for instructional planning
4. Criterion-referenced measures or test items used to determine successful attainment of the task/competency by the student
5. Instructional activities and steps required for teaching the task/competency
6. Tools, equipment, and materials/supplies required to provide necessary instruction
7. References and audiovisual materials, including software, helpful in teaching the task/competency.

TASK INVENTORY FOR

MEDICAL ASSISTANT

DUTY AREAS

1. PERFORMING EMERGENCY PROCEDURES
2. ASSISTING WITH PHYSICAL EXAMINATIONS
3. PERFORMING ASEPTIC TECHNIQUES
4. PERFORMING GENERAL OFFICE PROCEDURES
5. DEVELOPING EMPLOYABILITY SKILLS

This instructional resource has been designed for statewide distribution. Local vocational teachers or program designers are encouraged to adapt the content of the task inventory and teaching sequence to fit the needs of their students and community.

DUTY AREA

1. PERFORMING EMERGENCY PROCEDURES

TASKS/COMPETENCIES

1.1 Initiate first aid procedures in common emergencies

1.2 Apply bandages

1.3 Administer first aid for choking

1.4 Administer aid for cardiac arrest

1.5 Administer first aid in musculoskeletal injury

----------------Application--------------

DUTY AREA

1. PERFORMING EMERGENCY PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

1.1 Initiate first aid procedures in common emergencies

COURSE

Medical Assistant I (8345)

1.1

PERFORMANCE OBJECTIVE

P1.1 Given a simulated patient showing symptoms of shock, fainting, bleeding, seizure, or respiratory distress, initiate first aid procedures for these common emergencies with no errors, according to American Red Cross guidelines.

SELECTED ENABLING OBJECTIVES

E1.1.1 State the physiological symptoms for shock, fainting, seizure, and respiratory distress.

E1.1.2 List first aid procedures by priority.

E1.1.3 Describe the contents of a standard first aid kit.

E1.1.4 Demonstrate how to obtain emergency medical assistance in the local area.

CRITERION-REFERENCED MEASURE

C1.1 First aid procedure for common emergencies initiated with no errors, according to American Red Cross guidelines

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the physiological symptoms displayed by victims of various common medical emergencies (E1.1.1).
2. Display a standard first aid kit and have students identify and state the uses of each item (E1.1.3).
3. Ask an emergency medical technician or rescue squad member to discuss the priority in which first aid is performed and how to summon local emergency medical assistance (E1.1.2, E1.1.4).
4. Supervise student practice in initiating first aid procedures for various common emergencies (E1.1.1-E1.1.4).

SELECTED TOOLS AND MATERIALS

Standard first aid kit
Bandages
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Chart illustrating shock symptoms and treatment
Chart of pressure points
Film: First Aid--Bleeding and Shock. Churchill Films, 662 North Robertson, Los Angeles, California 90069-9990.
Software: See Appendix

SELECTED REFERENCES

Emergency First Aid Module. American Red Cross.

----------------Application--------------

DUTY AREA

1. PERFORMING EMERGENCY PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

1.2 Apply bandages

COURSE

Medical Assistant I (8345)

1.2

PERFORMANCE OBJECTIVE

P1.2 Given a simulated patient with an injury requiring a bandage, apply the appropriate bandage according to American Red Cross standards.

SELECTED ENABLING OBJECTIVES

E1.2.1 Identify the appropriate bandage for selected injuries.

E1.2.2 List precautions to take when applying bandages.

E1.2.3 Identify pressure points to control external bleeding.

E1.2.4 Apply a bandaid.

E1.2.5 Apply an elastic bandage.

E1.2.6 Apply a triangular bandage.

E1.2.7 Apply a tubular bandage.

E1.2.8 Apply a roller bandage.

CRITERION-REFERENCED MEASURE

C1.2 Appropriate bandage applied according to American Red Cross standards

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display bandages and discuss how each is used (E1.2.1).
2. Discuss precautions to observe when applying bandages (E1.2.2).
3. Ask an emergency medical technician or emergency room nurse to talk to the class about the different types of injuries requiring bandages and to demonstrate their proper application (E1.2.1, E1.2.2).
4. Have students locate pressure points for control of bleeding on a mannequin or a partner (E1.2.3).
5. Supervise student practice in applying bandages for various injuries (E1.2.4-E1.2.8).

SELECTED TOOLS AND MATERIALS

Elastic bandages
Roller gauze bandages of various sizes
Bandaids
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Chart on pressure points
Posters and charts of bandage applications
Software: See Appendix

SELECTED REFERENCES

Emergency First Aid Module. American Red Cross.
The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA

1. PERFORMING EMERGENCY PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

1.3 Administer first aid for choking

COURSE

Medical Assistant I (8345)
Medical Assistant II (8346)

1.3

PERFORMANCE OBJECTIVE

P1.3 Given a mannequin or access to a conscious patient showing symptoms of choking, administer first aid. Performance must be rated acceptable according to an instructor-prepared checklist based on guidelines provided in class.

SELECTED ENABLING OBJECTIVES

E1.3.1 Describe the functions of the respiratory system.

E1.3.2 List the symptoms of choking.

E1.3.3 Explain the causes of choking.

E1.3.4 Demonstrate the Heimlich Maneuver.

E1.3.5 Identify and explain precautions to observe when performing the Heimlich Maneuver.

CRITERION-REFERENCED MEASURE

C1.3 Instructor-prepared checklist; all items rated acceptable

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students identify the parts and functions of the respiratory system (E1.3.1).
2. Have students construct a bulletin board display on the symptoms and causes of choking and the proper emergency response (E1.3.2-E1.3.4).
3. Demonstrate the proper application of the Heimlich Maneuver and have students practice on a mannequin, observing all necessary precautions (E1.3.4, E1.3.5).

SELECTED TOOLS AND MATERIALS

Mannequin
Instructor-prepared checklist
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Chart of the respiratory system
Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA	**PROGRAM**
1. PERFORMING EMERGENCY PROCEDURES	MEDICAL ASSISTANT (17.0503)
TASK/COMPETENCY	**COURSE**
1.4 Administer aid for cardiac arrest	Medical Assistant I (8345) Medical Assistant II (8346)

1.4

PERFORMANCE OBJECTIVE

P1.4 Given an adult or child mannequin, administer aid for cardiac arrest by performing cardiopulmonary resuscitation (CPR) according to American Heart Association instructions.

SELECTED ENABLING OBJECTIVES

E1.4.1 Describe the functions of the cardiovascular system.

E1.4.2 Explain the intent and application of "good Samaritan" laws.

E1.4.3 Outline differences in CPR for adults and infants.

E1.4.4 Identify and explain precautions to be observed when administering CPR.

E1.4.5 Outline the steps for one-person and two-person CPR.

CRITERION-REFERENCED MEASURE

C1.4 CPR performed according to American Heart Association instructions

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss anatomical changes that take place in the heart, brain, and lungs during cardiac arrest (E1.4.1).
2. Distribute handout on the Good Samaritan Law and have students discuss legal rights of those administering and receiving emergency medical care (E1.4.2).
3. Provide both adult and infant mannequins for demonstration and student practice of CPR. Discuss differences in procedures for adults and infants (E1.4.3).
4. Show films and discuss steps involved in one-and two-person CPR (E1.4.5).
5. Discuss dangers of improperly administered CPR and precautions that should be taken by emergency personnel (E1.4.4).

SELECTED TOOLS AND MATERIALS

Adult and infant mannequins
Instructor-prepared handout: Good Samaritan Law
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Chart:	ABC's of Cardiac Arrest
	Chart of the cardiovascular system
Film:	New Breath of Life. American Heart Association (contact local chapter).
	Breath of Life. American Heart Association.
	CPR. American Heart Association.
Software:	See Appendix

SELECTED REFERENCES

American Red Cross CPR Module. American Red Cross.
The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application---------------

DUTY AREA

1. PERFORMING EMERGENCY PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

1.5 Administer first aid in musculoskeletal injury

COURSE

Medical Assistant I (8345)

1.5

PERFORMANCE OBJECTIVE

P1.5 Given a simulated accident situation involving muscular/skeletal injuries, apply appropriate first aid measures. The injured part must be immobilized and patient transported according to Red Cross guidelines.

SELECTED ENABLING OBJECTIVES

E1.5.1 Apply a splint.

E1.5.2 Improvise a stretcher.

E1.5.3 Transport an injured person.

E1.5.4 Apply a sling.

E1.5.5 Describe the muscular/skeletal system.

E1.5.6 Demonstrate proper body mechanics for both emergency worker and victim.

CRITERION-REFERENCED MEASURE

C1.5 First aid for musculoskeletal injury administered according to American Red Cross guidelines

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute handouts of musculoskeletal system and discuss in terms of proper body mechanics. Demonstrate and have students practice proper lifting techniques involving both materials and people (E1.5.5, E1.5.6).
2. Have students observe x-rays of fractures and demonstrate techniques for immobilizing the injured part (E1.5.1).
3. Discuss symptoms of various types of muscular injuries and their emergency treatment; have students practice applying slings for arm and shoulder injuries (E1.5.4).
4. Demonstrate and assist students in improvising stretchers (E1.5.2).
5. Demonstrate and discuss proper procedures for transporting an injured person (E1.5.3).
6. Divide students into teams to practice first aid for musculoskeletal injuries (E1.5.1-E1.5.6).

SELECTED TOOLS AND MATERIALS

Splints
Bandages
Slings
Handout of musculoskeletal system
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

X-rays of fractures
Charts of musculoskeletal system
Chart illustrating body mechanics
Software: See Appendix

SELECTED REFERENCES

Emergency First Aid Module. American Red Cross.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

TASKS/COMPETENCIES

2.1 Demonstrate safe body mechanics

2.2 Measure and record vital signs

2.3 Measure and record height and weight

2.4 Drape and position patient for examination

2.5 Perform visual screening tests

2.6 Collect urine specimens and perform selected tests

2.7 Assist with collection of microorganism smears

2.8 Obtain capillary blood specimen and perform selected hematology tests

2.9 Prepare patient for heart and respiratory function measurements

2.10 Prepare examination room for minor surgery

2.11 Demonstrate microbiological examination techniques

----------------Application--------------

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.1 Demonstrate safe body mechanics

COURSE

Medical Assistant I (8345)

2.1

PERFORMANCE OBJECTIVE

P2.1 Given a simulated patient in a wheelchair, an examining table, and instruction in body mechanics, demonstrate safe body mechanics by properly transferring the patient from a wheelchair to the examining table according to instructor demonstration. Both the medical assistant and the patient must have proper body alignment maintained at all times.

SELECTED ENABLING OBJECTIVES

E2.1.1 Demonstrate procedure for lifting a patient safely.

E2.1.2 Identify safe posture for sitting, standing, and walking.

E2.1.3 Use safe body mechanics in lifting an object and in push-pull of an object.

E2.1.4 Explain incidence and significance of back injury in health care.

CRITERION-REFERENCED MEASURE

C2.1 Patient transferred from wheelchair to examing table according to instructor demonstration; proper body alignment maintained throughout

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss protective postures for the spine (E2.1.1).
2. Discuss incidence of back injury in health care and its significance E2.1.2, E2.1.3).
3. Demonstrate safe body mechanics in everyday motions (E2.1.2, E2.1.3)
4. Divide students into two groups to give demonstrations of safe body mechanics in various motions and unsafe body mechanics in the same motions (E2.1.2-E2.1.4).
5. Discuss possibility of injury in unsafe body mechanics as seen in the demonstration (E2.1.1-E2.1.4).
6. Have students prepare poster on safe body mechanics (E2.1.4).

SELECTED TOOLS AND MATERIALS

Poster materials
Bed
Examining table
Wheelchair
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Model of human body showing spine
Software: See Appendix

SELECTED REFERENCES

Manual for Functional Training. Palmer and Toms.
The Wonderful Human Machine. American Medical Association.

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

TASK/COMPETENCY

2.2 Measure and record vital signs

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant I (8345)

2.2

PERFORMANCE OBJECTIVE

P2.2 Given equipment, simulated patient, and recording materials, measure and record vital signs within ±2 points accuracy.

SELECTED ENABLING OBJECTIVES

E2.2.1 Measure and record radial pulse.

E2.2.2 Measure and record respirations.

E2.2.3 Measure and record oral temperature.

E2.2.4 Measure and record axillary temperature.

E2.2.5 Measure and record blood pressure.

E2.2.6 Identify normal and abnormal ranges of measurements.

E2.2.7 Describe variables affecting vital signs.

CRITERION-REFERENCED MEASURE

C2.2 Vital signs measured and recorded within ±2 points accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Show the film, Heart and Circulatory System, and discuss the physiological basis for vital signs (E2.2.6, E2.2.7).
2. Show the film, When the Pressure Is On, to introduce the subject of blood pressure. Have students perform further research and report on the etiology, treatment, and prognosis of hypertension (E2.2.5, E2.2.6).
3. Demonstrate how to measure pulse rate, temperature, and blood pressure and have students practice with a partner (E2.2.1-E2.2.5).
4. Distribute chart sheets and have students record the vital signs of a partner (E2.2.1-E2.2.5).
5. Discuss the factors that may affect a person's vital signs and identify the normal ranges in body temperature, blood pressure, and respiration (E2.2.6, E2.2.7).

SELECTED TOOLS AND MATERIALS

Thermometers
Disinfectant
2x2's or cotton balls
Chart sheets
Blood pressure apparatus
Stethoscope
Watch or clock with second hand

SELECTED AUDIOVISUAL MATERIALS

Film: Heart and Circulatory System. Encyclopedia Britannica Educational Corporation, 425 North Michigan Avenue, Chicago, Illinois 60611.

Film: When the Pressure Is On. Prudential Insurance Company of America, Modern Talking Picture Service, 500 Park Street North, St. Petersburg, Florida 33709.

Chart of respiratory system

SELECTED REFERENCES

Carolina Human Blood Pressure Manual. Carolina Biological Supply Company.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

TASK/COMPETENCY

2.3 Measure and record height and weight

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant (8345)

2.3

PERFORMANCE OBJECTIVE

P2.3 Given adult and pediatric scales and other appropriate equipment, measure and record weights and heights of an infant and an adult, with 100% accuracy.

SELECTED ENABLING OBJECTIVES

E2.3.1 Weigh and measure an infant.

E2.3.2 Hold and undress infant without head control.

E2.3.3 Weigh and measure height of an adult.

CRITERION-REFERENCED MEASURE

C2.3 Adult and infant weights and heights measured and recorded with 100% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Demonstrate measurement of height and weight for adult and infant (E2.3.1).
2. Demonstrate holding, undressing, and dressing infant without head control (E2.3.2).
3. Arrange for students to participate in a community project by assisting in a community clinic for well children (E2.3.1, E2.3.2).
4. Discuss normal ranges in height and weight for infants, children, and adults (E2.3.1, E2.3.3).

SELECTED TOOLS AND MATERIALS

Infant doll or live infant
Infant clothes and diaper
Tape measure
Chart of norms
Examining table with paper

Pediatric scale
Adult scale
Patient chart sheets

SELECTED AUDIOVISUAL MATERIALS

Charts of standard weights (infants and adults)

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.4 Drape and position patient for examination

COURSE

Medical Assistant I (8345)

2.4

PERFORMANCE OBJECTIVE

P2.4 Given a simulated patient, gown, sheets, and towels, drape and position the patient for selected examination to be performed by the doctor. Performance must be rated acceptable according to instructor-prepared checklist based on selected examination.

SELECTED ENABLING OBJECTIVES

E2.4.1 Identify various positions for physical examinations.

E2.4.2 Position and drape patient in lithotomy position.

E2.4.3 Prepare examination table for selected position.

E2.4.4 Assemble equipment and materials for examination.

E2.4.5 Demonstrate hand-washing procedure.

E2.4.6 Spell and define selected medical terminology.

CRITERION-REFERENCED MEASURE

C2.4 Instructor-prepared checklist on draping and positioning patient for selected examination; all items rated acceptable

SELECTED INSTRUCTIONAL ACTIVITIES

1. Demonstrate and discuss selected methods of draping and positioning (E2.4.1, E2.4.2).
2. Display equipment and materials used for examinations and have students identify the function of each item (E2.4.4).
3. Demonstrate how to prepare the examination table for selected types of examinations (E2.4.3).
4. Distribute vocabulary sheets and have students spell and define the terms on a quiz (E2.4.6).
5. Review handwashing procedures; have students demonstrate (E2.4.5).

SELECTED TOOLS AND MATERIALS

Examination room setting
Gowns
Sheets
Towels
Thermometers
Sphygmomanometer
Stethoscope
Flashlight
Ophthalmoscope
Nasal speculum
Tongue blades/holder
Laryngoscope
Tuning fork
Otoscope
Percussion hammer
Rubber gloves/lubricant
Vaginal speculum
Cervical spatula
Cervical aspirator
Fixative solution
Slides
Anoscope
Proctoscope
Cleaning solution
Waste receptacle
Vocabulary sheets
Instructor-prepared checklists

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA

2. ASSIST WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.5 Perform visual screening test

COURSE

Medical Assistant I (8345)

2.5

PERFORMANCE OBJECTIVE

P2.5 Given a simulated patient and a visual acuity chart, perform a visual screening test according to instructor demonstration. The patient's near and distance visual acuity must be determined with 100% accuracy.

SELECTED ENABLING OBJECTIVES

E2.5.1 Outline steps for administering standard visual acuity tests.

E2.5.2 Perform color-blind testing.

E2.5.3 Define related medical terminology.

CRITERION-REFERENCED MEASURE

C2.5 Near and distant visual acuity determined with 100% accuracy by performing visual screening test according to instructor demonstration

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute student information and procedure sheets describing visual acuity measurement (E2.5.1, E2.5.3).
2. Demonstrate and have students practice visual screening (E2.5.1).
3. Supervise student practice of color-blind testing (E2.5.2).
4. Have students define related terminology (E2.5.3).

SELECTED TOOLS AND MATERIALS

Visual acuity charts (Snelling)
Patient chart sheets
Ishihara's color book
Information and procedure sheets (instructor-prepared)
Vocabulary sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Human Vision. Carolina Biological Supply Company.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 124. V-TECS.

----------------Application-------------

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.6 Collect urine specimens and perform selected tests

COURSE

Medical Assistant I (8345)

2.6

PERFORMANCE OBJECTIVE

P2.6 Given necessary equipment and supplies, collect three urine specimens in sufficient quantity and perform selected tests according to procedure sheets provided. Collection procedure and tests must be performed as directed and test results must match those of the instructor.

SELECTED ENABLING OBJECTIVES

E2.6.1 Collect a random voided urine specimen.

E2.6.2 Assess and record color, gross appearance, and odor of urine specimen.

E2.6.3 Collect a "clean catch" urine specimen.

E2.6.4 Perform a specific gravity test on a urine specimen.

E2.6.5 Perform a biochemical urine test.

E2.6.6 Record test results.

E2.6.7 Describe the urinary system.

CRITERION-REFERENCED MEASURE

C2.6 Three urine specimens collected and tested according to procedure sheets; test results to match those of instructor

SELECTED INSTRUCTIONAL ACTIVITIES

1. Provide handout of information and procedure sheets for each type of urine collection and test required (E2.6.1-E2.6.5).
2. Have students label a chart of the urinary system and state the function of each part (E2.6.7).
3. Discuss the importance of proper collection and labeling procedures (E2.6.1, E2.6.3).
4. Demonstrate required tests and discuss the significance of observations and results (E2.6.2, E2.6.4, E2.6.5).
5. Have students practice performing selected tests on their own urine specimens (E2.6.1-E2.6.5).
6. Distribute recording forms and have students record test results (E2.6.6).

SELECTED TOOLS AND MATERIALS

Urine samples
Containers (sterile/unsterile)
Labels
Requisition slips
Multistix
Urinometer
Disinfectant
Cleansing pads
Slides
Cover slips
Centrifuge
Microscope
Eyedropper
Recording sheets
Information and procedure sheets (instructor-prepared)
Test results comparison sheets

SELECTED AUDIOVISUAL MATERIALS

Chart of the urinary system

SELECTED REFERENCES

Clinical Laboratory Methods, 9th ed. Baur, et al.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objectives 45, 52, 53, 56, and 59. V-TECS.

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DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.7 Assist with collection of microorganism smears

COURSE

Medical Assistant I (8345)

2.7

PERFORMANCE OBJECTIVE

P2.7 Given a simulated patient, assist with collection of microorganism smears by assembling the proper supplies, preparing the patient, and preparing the slides for tests. Procedure must be rated acceptable according to instructor's checklist.

SELECTED ENABLING OBJECTIVES

E2.7.1 Identify types of smears and a condition requiring the collection of each type.

E2.7.2 List or assemble supplies needed for various types of smears.

E2.7.3 Outline patient preparation procedures.

E2.7.4 Demonstrate slide preparation technique.

E2.7.5 Identify information needed to label smear specimens.

E2.7.6 Explain the purpose of a Pap test.

E2.7.7 Describe the female reproductive system.

CRITERION-REFERENCED MEASURE

C2.7 Instructor's checklist, all items rated acceptable

INSTRUCTOR'S CHECKLIST 2.7

DUTY: ASSISTING WITH PHYSICAL EXAMINATIONS

TASK: Assist with collection of microorganism smears

ACTIVITY: Assist with collection of throat, ear, eye, wound, urethral, vaginal, or cervical smears

ITEM	RATING*	
	Acceptable	Unacceptable
1. Washed hands.		
2. Prepared the patient.		
3. Assembled necessary supplies.		
4. Passed indicated supplies to physician.		
5. Spread collected material on the slide.		
6. Labeled the specimen.		
7. Filled out lab requisition slip.		

***All items must receive acceptable rating.**

SELECTED INSTRUCTIONAL ACTIVITIES

1. Describe reasons for throat, eye, ear, wound, urethal, vaginal, and cervical smears and the significance of various test results (E2.7.1).

2. Display instruments and supplies needed for smear collections and have students name each item and its function (E2.7.2).

3. Demonstrate how patients are instructed and prepared for smear collections (E2.7.3).

4. Demonstrate and have students practice preparing and labeling slides (E2.7.4, E2.7.5).

5. Have students name each part of the female reproductive system and state its function (E2.7.7).

6. Discuss the purpose and importance of Pap tests (E2.7.6).

7. Have students examine smears and tissue samples through a microscope and record their observations (E2.7.1, E2.7.6).

SELECTED TOOLS AND MATERIALS

Swabs
Blank slides
Vaginal speculum
Cellophane tape
Fixative spray
Containers
Labels
Lab requisition slips
Mailers
Drapes
Patient chart sheets
Microscope
Instructor's checklist

SELECTED AUDIOVISUAL MATERIALS

Chart of female reproductive system
Slides of smears and tissue samples

SELECTED REFERENCES

Clinical Skills and Assisting Techniques for the Medical Assistant. Zakus.
Collection, Handling, and Shipment of Microbiological Specimens. Center for Disease Control.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objectives 48, 49. V-TECS.

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

TASK/COMPETENCY

2.8 Obtain capillary blood specimen and perform selected hematology tests

---------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant I (8345)

2.8

PERFORMANCE OBJECTIVE

P2.8 Given necessary equipment and supplies and simulated patient, obtain a capillary blood specimen and perform selected hematology tests according to standard laboratory technique. Adequate site for collection must be identified and prepared, adequate blood specimen must be collected for tests, and results of each test performed must be the same as that obtained by the instructor.

SELECTED ENABLING OBJECTIVES

E2.8.1 Obtain a capillary blood specimen.

E2.8.2 Perform blood grouping and typing.

E2.8.3 Differentiate between red blood count, white blood count, and platelets.

E2.8.4 Separate plasma from cells.

E2.8.5 Describe blood components.

CRITERION-REFERENCED MEASURE

C2.8 Capillary blood specimen collected in sufficient quantity for tests; tests performed according to standard lab technique; results of each test performed identical to those obtained by instructor

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students use microscope to study prepared slides (E2.8.2, E2.8.3, E2.8.5).
2. Distribute information and procedure sheets (E2.8.1-E2.8.5).
3. Have students practice obtaining a capillary blood specimen to use in typing and clotting procedures (E2.8.1, E2.8.2).
4. Demonstrate use of centrifuge with provided specimen (E2.8.4).
5. Supervise use of the centrifuge with provided specimen (E2.8.4, E2.8.5).

SELECTED TOOLS AND MATERIALS

Centrifuge
Blood specimens
Prepared slides
Lancets
Alcohol swabs
Microscope
Bandaid
Capillary tube
Prepared slides
Antiserum
Blood specimens
Centrifuge
Recording forms
Labels
Information and procedure sheets for hematology tests (instructor-prepared)

SELECTED AUDIOVISUAL MATERIALS

Charts on blood components

Commercial slides: 35mm and microscopic (Carolina Biological Supply)

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objectives 72-74. V-TECS.
Textbook for Laboratory Assistants, 3rd ed. Oppenheim.

----------------Application--------------

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.9 Prepare patient for heart and respiratory function measurements

COURSE

Medical Assistant II (8346)

2.9

PERFORMANCE OBJECTIVE

P2.9 Given EKG leads, gel, wet spirometer, recording forms, and access to patient, prepare a patient for measurement of heart rhythms and breathing functions. All items on the instructor's checklist must be completed without error.

SELECTED ENABLING OBJECTIVES

E2.9.1 Outline procedure for preparing a patient for an electrocardiogram (EKG).

E2.9.2 Measure and record breathing functions, using wet spirometer.

E2.9.3 Describe circulatory system.

E2.9.4 Describe respiratory system.

E2.9.5 Explain the significance of heart and respiratory function tests.

CRITERION-REFERENCED MEASURE

C2.9 Preparation of patient for EKG or breathing function test; all items on instructor's checklist completed without error

INSTRUCTOR'S CHECKLIST 2.9a

DUTY: ASSISTING WITH PHYSICAL EXAMINATIONS

TASK: Prepare patient for heart and respiratory function measurements

ACTIVITY: Prepare patient for EKG test

ITEM	RATING*	
	Acceptable	Unacceptable
1. Gathered supplies prior to procedure and returned to appropriate place after completion of task.		
2. Performed aseptic measures.		
3. Introduced self and explained procedure to patient.		
4. Checked machine for grounding.		
5. Applied gel to leads and then leads to the patient, correctly.		
6. Calibrated machine for use by physician or technician.		
7. Removed leads and assisted patient to remove gel after procedure.		

*All items must receive acceptable rating.

INSTRUCTOR'S CHECKLIST 2.9b

DUTY: ASSISTING WITH PHYSICAL EXAMINATIONS

TASK: Prepare patient for heart and respiratory function measurements

ACTIVITY: Prepare patient for respiration test using wet spirometer

ITEM	RATING*	
	Acceptable	Unacceptable
1. Gathered supplies prior to procedure and returned to appropriate place after completion.		
2. Performed aseptic measures.		
3. Introduced self and explained procedure to patient.		
4. Demonstrated placement of mouthpiece and inhalation/exhalation.		
5. Noted results of test correctly on chart.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute handouts for respiratory and cardiovascular systems (E2.9.3, E2.9.4).
2. Demonstrate use of wet spirometer and preparation for EKG (E2.9.1, E2.9.2).
3. Distribute information sheets and procedure sheets; have students record results of practice findings (E2.9.1, E2.9.2).
4. Supervise student practice in using wet spirometer and preparing patient for EKG (E2.9.1, E2.9.2).
5. Discuss the significance of findings (E2.9.5).

SELECTED TOOLS AND MATERIALS

EKG leads
Gel
Wet spirometer
Recording forms
Cloth
Mannequin
Information and procedure sheets (instructor-prepared
Instructor's checklists
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Charts of the heart and respiratory system
Software: See Appendix

SELECTED REFERENCES

Manual on operation of wet spirometer from manufacturer.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

TASK/COMPETENCY

2.10 Prepare examination room for minor surgery

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant I (8345)

2.10

PERFORMANCE OBJECTIVE

P2.10 Given a case study of selected minor office surgery, prepare the examination room by cleaning the room and assembling all necessary materials and equipment. Procedure must be judged acceptable according to instructor-provided checklist.

SELECTED ENABLING OBJECTIVES

E2.10.1 Identify basic surgical tray instruments.

E2.10.2 Assemble all items necessary for minor surgery.

E2.10.3 Explain the requirements for surgical asepsis.

E2.10.4 Demonstrate procedure for disinfecting necessary examination room surfaces.

CRITERION-REFERENCED MEASURE

C2.10 Examination room prepared for minor surgery according to instructor-prepared checklist; all items rated acceptable

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss and demonstrate how to clean examining table, counter tops, and furniture with disinfectant (E2.10.3, E2.10.4).
2. Demonstrate and have students practice assembly of necessary material and equipment for minor surgery (E2.10.1, E2.10.2).
3. Provide written and oral practice of names of surgical instruments (E2.10.1).

SELECTED TOOLS AND MATERIALS

Sterile linen (drapes)
Surgical equipment
Gown, mask, cap, gloves, examination room setting
Instructor-prepared checklist

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Clinical Skills and Assisting Techniques for the Medical Assistant. Zakus.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 137. V-TECS.

Application

DUTY AREA

2. ASSISTING WITH PHYSICAL EXAMINATIONS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

2.11 Demonstrate microbiological examination techniques

COURSE

Medical Assistant II (8346)

2.11

PERFORMANCE OBJECTIVE

P2.11 Given a microscope, blank and prepared slides, cover slips, stains, alcohol lamp, and alcohol, demonstrate microbiological examination techniques by preparing assigned slides according to procedure sheets provided and bringing into focus, using high and low power objectives of microscope.

SELECTED ENABLING OBJECTIVES

E2.11.1 Demonstrate operation of microscope.

E2.11.2 Stain a wet mount slide.

E2.11.3 Stain a microbiological smear.

E2.11.4 Outline the history and usage of microscope.

CRITERION-REFERENCED MEASURE

C2.11 Slides prepared according to procedure sheets provided; microscope brought into focus with both high and low power

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students practice using the microscope with prepared slides (E2.11.1).
2. Provide handout with information and procedure sheets on slide preparation (E2.11.2, E2.11.3).
3. Demonstrate all facets of slide preparation, then have students prepare microbiological slides (E2.11.1-E2.11.3).
4. Discuss microbiological chart (E2.11.3).
5. Have students use lab kit to determine effects of common antibiotics on bacteria (E2.11.1).
6. Invite a laboratory technician to speak to the class about various tests and demonstrate techniques with the microscope (E2.11.1-E2.11.4).

SELECTED TOOLS AND MATERIALS

Microscope
Blank and prepared slides
  and cover slips
Alcohol lamp
Alcohol
Iodine solution
Alkaline crystal violet solution
Safranin solution
Buffer solution
Bacterial inhibition lab kit (Carolina
  Biological Supply)
Information and procedure sheets
  (instructor-prepared)

SELECTED AUDIOVISUAL MATERIALS

Chart of microorganisms
Microbiological charts

SELECTED REFERENCES

Collection, Handling, and Shipment of Microbiological Specimens. Center for Disease Control.
Textbook for Laboratory Assistants, 3rd ed. Oppenheim.

DUTY AREA

3. APPLYING ASEPTIC TECHNIQUES

TASKS/COMPETENCIES

3.1 Wash hands

3.2 Don sterile gloves

3.3 Sterilize materials, using the steam autoclave

3.4 Open sterile packages and place items on a sterile field

----------------Application--------------

DUTY AREA

3. APPLYING ASEPTIC TECHNIQUES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

3.1 Wash hands

COURSE

Medical Assistant I (8345)

3.1

PERFORMANCE OBJECTIVE

P3.1 Given access to sink, soap, brush, and paper towels, wash hands. All steps in the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E3.1.1 Identify reasons for handwashing.

E3.1.2 Define basic vocabulary of asepsis.

E3.1.3 Outline steps in the handwashing procedure.

CRITERION-REFERENCED MEASURE

C3.1 Hands washed; all steps on instructor's checklist rated acceptable

INSTRUCTOR'S CHECKLIST 3.1

DUTY: APPLYING ASEPTIC TECHNIQUES

TASK: Wash hands

ACTIVITY: Wash hands to decontaminate

ITEM	RATING*	
	Acceptable	Unacceptable
1. Removed rings and watch.		
2. Opened faucet, adjusted temperature, and left water running.		
3. Applied soap and lathered hands.		
4. Cleaned under and around fingernails.		
5. Used rotary movement and friction, moving up from fingers to arm.		
6. Rinsed, holding hands upward from wrist.		
7. Repeated lathering and rinsing.		
8. Kept hands higher than wrists during washing and rinsing procedure.		
9. Dried hands.		
10. Turned off faucet, using paper towel.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss reasons for hand decontamination (E3.1.1).
2. Have students complete worksheets on the basic vocabulary of asepsis (E3.1.2).
3. Demonstrate the handwashing procedure (E3.1.3).
4. Supervise student practice, using fluorescent light and Germ-Glo to check results (E3.1.3).

SELECTED TOOLS AND MATERIALS

Sink
Soap
Brush
Paper towels

Fluorescent "bacteria" light kit
(Germ-Glo)
Instructor's checklist
Vocabulary worksheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 112. V-TECS.

DUTY AREA

3. APPLYING ASEPTIC TECHNIQUES

TASK/COMPETENCY

3.2 Don sterile gloves

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant I (8345)

3.2

PERFORMANCE OBJECTIVE

P3.2 Given a package of sterile gloves and information on sterile technique, don the gloves without breaking sterile technique. All components on the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E3.2.1 Differentiate between sterile and nonsterile items.

E3.2.2 Describe the integumentary system.

E3.2.3 Identify four lines of body defense against infection.

E3.2.4 Describe methods of infection control in medical facilities.

E3.2.5 Open package of sterile gloves without breaking sterile technique.

E3.2.6 Remove sterile gloves.

CRITERION-REFERENCED MEASURE

C3.2 Instructor's checklist, all components rated acceptable

INSTRUCTOR'S CHECKLIST 3.2

DUTY: APPLYING ASEPTIC TECHNIQUE

TASK: Don sterile gloves

ACTIVITY: Don sterile gloves without breaking sterile technique

ITEM	RATING*	
	Acceptable	Unacceptable
1. Placed package on a hard surface.		
2. Washed and dried hands according to aseptic technique; applied powder, if necessary.		
3. Opened package to expose inner envelope.		
4. Used right hand to grasp folded edge of cuff for left-hand glove and lifted it out of the envelope.		
5. Put glove on left hand, keeping cuff turned back.		
6. Slipped gloved fingers inside cuff of right-hand glove and lifted it out of the envelope.		
7. Put glove on right hand, keeping gloved fingers of hand inside cuff.		
8. Unfolded cuff over right wrist without touching exposed skin.		
9. Slipped gloved fingers under cuff of left-hand glove and folded back cuff over wrist.		
10. Adjusted gloves on fingers.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review handwashing (surgical and medical) (E3.2.4).
2. Discuss asepsis and infection control; have students define associated terms (E3.2.1-E3.2.4).
3. Have students label an illustration of the integumentary system and state the function of each component (E3.2.2, E3.2.3).
4. Discuss sterile techniques used in the care of burn patients and contagious patients (E3.2.4).
5. Invite a speaker from hospital central supply to discuss the packaging and handling of sterile items (E3.2.1, E3.2.4).
6. Demonstrate and have students practice putting on and removing sterile gloves (E3.2.1-E3.2.5).

SELECTED TOOLS AND MATERIALS

Gloves
Sterile package
Instructor's checklist

SELECTED AUDIOVISUAL MATERIALS

Illustration of integumentary system

SELECTED REFERENCES

Clinical Skills and Assisting Techniques for the Medical Assistant. Zakus.
Medical Assistant, Performance Objective 113. V-TECS.

----------------Application--------------

DUTY AREA

3. APPLYING ASEPTIC TECHNIQUES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

3.3 Sterilize materials, using the steam autoclave

COURSE

Medical Assistant I (8345)

3.3

PERFORMANCE OBJECTIVE

P3.3 Given access to autoclave and selected materials, sterilze materials, using the steam autoclave. All items on the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E3.3.1 Clean instruments for autoclaving.

E3.3.2 Identify components of autoclave.

E3.3.3 Wrap instruments for steam autoclave.

E3.3.4 Remove sterile packages from autoclave.

E3.3.5 Outline safety precautions for working with steam and pressure.

CRITERION-REFERENCED MEASURE

C3.3 Autoclave operated and selected materials sterilized; all items on instructor's checklist rated acceptable

INSTRUCTOR'S CHECKLIST 3.3

DUTY: APPLYING ASEPTIC TECHNIQUES

TASK: Sterilize materials, using the steam autoclave

ACTIVITY: Operate the steam autoclave

ITEM	RATING*	
	Acceptable	Unacceptable
1. Sorted packages according to content.		
2. Checked time and temperature chart.		
3. Preheated autoclave.		
4. Arranged items on tray, allowing for circulation of steam through and around each package.		
5. Set timer and temperature gauges according to load requirements.		
6. Locked autoclave door.		
7. When timer rang: a. Vented steam b. Dried items c. Cooled items.		
8. Unloaded autoclave; labeled and stored items as necessary.		
9. Observed all applicable safety precautions.		

***All items must receive acceptable rating.**

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students identify each component of the autoclave and describe its function (E3.3.1).
2. Review cleaning of instruments (E3.3.1).
3. Discuss and demonstrate wrapping of instruments for autoclaving (E3.3.3).
4. Demonstrate the use of the autoclave (E3.3.2-E3.3.5).
5. Supervise student practice of cleaning, wrapping, and autoclaving instruments (E3.3.1-E3.3.5).

SELECTED TOOLS AND MATERIALS

Autoclave
Instruments
Wrappings
Autoclave tape
Indicator strip
Instructor's checklist

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Clinical Skills and Assisting Techniques for the Medical Assistant. Zakus.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 115. V-TECS.

---------------Application-------------

DUTY AREA

3. APPLYING ASEPTIC TECHNIQUES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

3.4 Open sterile packages and place items on a sterile field

COURSE

Medical Assistant I (8345)

3.4

PERFORMANCE OBJECTIVE

P3.4 Given packages containing sterile items, open the packages and place the items on a sterile field. Contents of packages must not be touched by any unsterile surfaces.

SELECTED ENABLING OBJECTIVES

E3.4.1 Identify basic principles of sterilization and contamination.

E3.4.2 Don sterile mask and gloves.

E3.4.3 Open disposable sterile items.

E3.4.4 Explain principles of asepsis.

CRITERION-REFERENCED MEASURE

C3.4 Packages containing sterile items opened and items placed on a sterile field without touching unsterile surfaces

SELECTED INSTRUCTIONAL ACTIVITIES

1. Invite a worker from hospital central supply or an infection control nurse to discuss and demonstrate handling of sterile items (E3.4.1-E3.4.4).
2. Have students research and report on infection control and its importance (E3.4.1, E3.4.4).
3. Review procedures for donning sterile clothing (E3.4.2).
4. Discuss procedures for handling disposable sterile items (E3.4.3).
5. Demonstrate and have students practice opening sterile packages (E3.4.1-E3.4.4).

SELECTED TOOLS AND MATERIALS

Wrapped sterile packages
Sterile fields
Sterile gloves
Transfer forceps
Sterile masks

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

The Medical Assistant, 4th ed., Cooper and Bredow.
Medical Assistant, Performance Objective 111. V-TECS.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASKS/COMPETENCIES

4.1 Place and receive telephone calls
4.2 Receive patients and visitors
4.3 Maintain an appointment book
4.4 Compose business letters
4.5 Type business letters
4.6 Prepare form letters for mailing
4.7 Prepare specialized mail, determining appropriate classification and fees
4.8 Use medical terminology
4.9 Write problem-oriented medical notes
4.10 Collate a patient's chart
4.11 Complete Medicare and Medicaid forms
4.12 Complete insurance claim forms
4.13 Complete worker compensation forms
4.14 Complete charge slips
4.15 Complete insurance reimbursement forms
4.16 Prepare bank desposit slip
4.17 Reconcile bank statement
4.18 Post payments
4.19 Initiate collection of delinquent bills
4.20 Prepare payroll
4.21 Maintain petty cash fund
4.22 Disburse accounts payable
4.23 Process incoming mail
4.24 Prepare purchase order
4.25 Update inventory list
4.26 Transcribe dictated medical records
4.27 Maintain medical records file
4.28 Complete federal narcotics report

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.1 Place and receive telephone calls

COURSE

Medical Assistant I (8345)

4.1

PERFORMANCE OBJECTIVE

P4.1 Given a telephone handset and case situations requiring telephone use, place and receive the appropriate calls. All items on the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E4.1.1 Describe positive telephone communication.

E4.1.2 Demonstrate procedure for taking messages.

E4.1.3 Demonstrate correct way to answer business calls.

E4.1.4 Demonstrate use of various types of telephone equipment.

E4.1.5 Identify calls which should be referred immediately to the physician.

E4.1.6 Explain the concept of confidentiality of information.

CRITERION-REFERENCED MEASURE

C4.1 Telephone calls placed and received; all items on instructor's checklist rated acceptable

INSTRUCTOR'S CHECKLIST 4.1a

DUTY: PERFORMING GENERAL OFFICE PROCEDURES

TASK: Place and receive telephone calls

ACTIVITY: Place a telephone call

ITEM	RATING*	
	Acceptable	Unacceptable
1. Verified telephone number.		
2. Dialed number properly.		
3. Introduced self and identified name of doctor to answering party.		
4. Spoke to proper party or left message, if appropriate.		
5. Answered questions as needed.		
6. Kept call brief, concise, and to the point.		
7. Spoke in well modulated tones, clearly and with sufficient volume.		
8. Replaced receiver gently at completion of the call.		

*All items must receive acceptable rating.

INSTRUCTOR'S CHECKLIST 4.1b

DUTY: PERFORMING GENERAL OFFICE PROCEDURES

TASK: Place and receive telephone calls

ACTIVITY: Receive a telephone call

ITEM	RATING*	
	Acceptable	Unacceptable
1. Answered phone promptly.		
2. Was prepared to take notes or messages.		
3. Identified office and self.		
4. Answered questions in a polite, courteous manner.		
5. Referred the caller to the doctor or nurse, if necessary.		
6. Spoke in well modulated tones, clearly and with sufficient volume.		
7. Recorded messages accurately, according to office policy.		
8. Operated equipment correctly to transfer call or place caller on hold, if necessary.		
9. Replaced receiver gently when call was completed.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Invite a speaker from the local telephone company to demonstrate various types of telephone equipment used in offices (E4.1.4).
2. Demonstrate proper use of telephone and message forms (E4.1.1).
3. Demonstrate proper reception of telephone calls and recording of messages (E4.1.2, E4.1.3).
4. Demonstrate procedure for placing telephone calls and have students practice (E4.1.1).
5. Have students place phone calls in accordance with written situations and dialogues provided by the instructor (E4.1.1).
6. Have students receive phone calls and take messages in a simulated medical office setting (E4.1.2).
7. Give examples of telephone calls which need to be immediately referred to the physician and information which must not be given out over the telephone (E4.1.5, E4.1.6).

SELECTED TOOLS AND MATERIALS

Telephone
Message pads
Appointment log
Instructor-prepared case situations
Instructor's checklist

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 1. V-TECS.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.2 Receive patients and visitors

COURSE

Medical Assistant I (8345)

4.2

PERFORMANCE OBJECTIVE

P4.2 Given three situations, role play the reception of visitors according to established office procedures. All items on the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E4.2.1 Describe procedures used for patient reception.

E4.2.2 Demonstrate system for registering patients.

E4.2.3 Explain procedures for handling unscheduled visitors and emergency situations.

E4.2.4 Explain the importance of patient and visitor reception in terms of public relations for the physician.

CRITERION-REFERENCED MEASURE

C4.2 Role play of patient and visitor reception according to established office procedures; all items on instructor's checklist rated acceptable

INSTRUCTOR'S CHECKLIST 4.2

DUTY: PERFORMING GENERAL OFFICE PROCEDURES

TASK: Receive patients and visitors

ACTIVITY: Roleplay the reception of patients and visitors

ITEM	RATING*	
	Acceptable	Unacceptable
1. Acknowledged each person in a pleasant manner.		
2. Ascertained each person's name and purpose of visit.		
3. Asked patients to sign in.		
4. Determined if patient had new address, telephone number, or insurance number.		
5. Invited each person to be seated.		
6. Informed each unscheduled visitor if and when the doctor would be available.		
7. Handled emergency situations according to office policy.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the importance of professionalism in the reception of patients and visitors and explain procedures for simulation (E4.2.1, E4.2.4).

2. Explain and demonstrate various systems for registering patients; emphasize that many physcian's offices have their patient files on computer. If possible demonstrate computerized system (E4.2.2).

3. Discuss how unscheduled or emergency visits should be handled (E4.2.3).

4. Have students discuss differences in reception procedures for various office situations such as single physician, a medical group, a pediatric specialty, a clinic, an emergency facility, etc. (E4.2.1).

SELECTED TOOLS AND MATERIALS

Office setting
Appointment book
First aid kit
Telephone
Microcomputer (optional)
Copies of case situations related to patient and visitor reception (instructor-prepared)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Office Administration Procedures. Frew and Frew.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.3 Maintain an appointment book

COURSE

Medical Assistant II (8346)

4.3

PERFORMANCE OBJECTIVE

P4.3 Given an appointment book, schedule all appointments requested for one day in a group consisting of three physicians. Upon completion, the book must show names of patients, including a notation indicating a new patient and telephone number. Buffer time must be provided in the daily schedule and estimated time needed for each patient must be marked off.

SELECTED ENABLING OBJECTIVES

E4.3.1 Distinguish among components of appointment schedule.

E4.3.2 Define selected terminology.

E4.3.3 Demonstrate use of computer in appointment scheduling.

CRITERION-REFERENCED MEASURE

C4.3 Medical group appointments scheduled for one day, to include for each physician:
- a. Patient name
- b. Notation for new patients with address and telephone number
- c. Buffer time
- d. Estimated time needed for each patient

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss structure of appointment book: (E4.3.1, E4.3.2).
   a. Buffer time
   b. Meeting time
   c. Lunch
   d. Hospital visitation
   e. Length of time for various patient illnesses

2. Have students practice several days' scheduling with a number of patients, increasing with each assignment (E4.3.1).

3. Invite as a guest speaker a medical assistant who specializes in general office tasks. Ask the speaker to demonstrate computerized appointment scheduling for several different physicians. (E4.3.1, E4.3.3).

SELECTED TOOLS AND MATERIALS

Appointment book
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Office Administrative Procedures. Frew and Frew.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.4 Compose business letters

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.4

PERFORMANCE OBJECTIVE

P4.4 Given necessary materials, sample letters, and specific instruction, compose three letters of different types. When completed, the letters must be in good business form, legible, and without errors in spelling, grammar, or punctuation. Format must conform to samples provided.

SELECTED ENABLING OBJECTIVES

E4.4.1 Identify types of business letters issued and received by medical offices.

E4.4.2 Spell and define selected medical terms.

E4.4.3 Punctuate complex sentences.

E4.4.4 Explain the importance of neat, correct correspondence to a physician's practice.

E4.4.5 Proofread completed letters for grammar, spelling, and punctuation errors.

CRITERION-REFERENCED MEASURE

C4.4 Three types of business letters composed according to instructions, to be in good business form; legible; without errors in spelling, grammar, and punctuation; format to conform to samples provoided

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display various types of correspondence sent and received by medical offices and have students identify by type, such as requests for information, supply orders, correspondence with colleagues, correspondence with patients, etc. (E4.4.1).

2. Have students complete vocabulary sheets and a quiz on the spelling of various medical terms (E4.4.2).

3. Distribute paragraphs which lack proper punctuation and have students punctuate. If possible, have students practice computer proofreading (E4.4.3).

4. Explain the impact of correspondence on the office image; emphasize that errors in this area create doubts about a physician's competence in other areas (E4.4.5).

5. Have students compose letters in answer to correspondence received and then proofread those composed by a partner, marking any errors discovered (E4.4.5)

SELECTED TOOLS AND MATERIALS

Sample letters
Instructions for correspondence
Dictionaries
Grammar references
Vocabulary sheets (instructor-prepared)
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Office Assistant: Administrative and Clinical, 5th ed. Frederick and Kinn.
Secretarial and Administrative Procedures. Jennings.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.5 Type business letters

COURSE

Medical Assistant II (8346)

4.5

PERFORMANCE OBJECTIVE

P4.5 Given a typewriter or word processor, format guidelines, a corrected rough draft of a letter and necessary supplies, type the correspondence within a time period specified. Completed letter must be in correct business form and contain no typographical errors.

SELECTED ENABLING OBJECTIVES

E4.5.1 Spell selected terms.

E4.5.2 Apply grammar and punctuation rules.

E4.5.3 Demonstrate error correction methods.

E4.5.4 Demonstrate methods of producing multiple copies of correspondence.

E4.5.5 Proofread typed copy.

CRITERION-REFERENCED MEASURE

C4.5 Letter typed from rough draft within time period specified, in correct business form, with no typographical errors

SELECTED INSTRUCTIONAL ACTIVITIES

1. Review necessary spelling, grammar, and punctuation; emphasize rules for word division (E4.5.1, E4.5.2).

2. Invite a medical assistant to discuss how correspondence is produced in his or her office (E4.5.3, E4.5.4).

3. Explain the importance of proofreading copy before it is removed from the typewriter or printed out by the word processor, and demonstrate various error correction techniques (E4.5.3, E4.5.5).

4. Have students practice typing correspondence; set progessively shorter time limits for production, based on type and length of letter, until students meet entry-level employee standards for the community (E4.5.1-E4.5.5).

SELECTED TOOLS AND MATERIALS

Typewriter/word processor
Stationery
Carbon paper (optional)
Rough draft of a business letter
Format guidelines
Word division manual
Copy machine
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Office Assistant: Administrative and Clinical, 5th ed. Frederick and Kinn.
Secretarial and Administrative Procedures. Jennings.

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DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.6 Prepare form letters for mailing

COURSE

Medical Assistant II (8346)

4.6

PERFORMANCE OBJECTIVE

P4.6 Given necessary materials and specific instruction, prepare five form letters for mailing within the time limit specified. Procedure must be rated acceptable according to the instructor's checklist.

SELECTED ENABLING OBJECTIVES

E4.6.1 Contrast form letters with other business letters.

E4.6.2 Produce typewriter form letters.

E4.6.3 Use a word processor to produce form letters.

E4.6.4 Address envelope.

E4.6.5 Use a postage meter.

CRITERION-REFERENCED MEASURE

C4.6 Form letters prepared for mailing within time limit specified, according to instructor's checklist; all items rated acceptable

INSTRUCTOR'S CHECKLIST 4.6

DUTY: PERFORMING GENERAL OFFICE PROCEDURES

TASK: Prepare form letters for mailing

ACTIVITY: Prepare five form letters for mailing

ITEM	RATING*	
	Acceptable	Unacceptable
1. Used specified format.		
2. Made insertions correctly.		
3. Corrected all errors neatly.		
4. Used appropriate method of creating multiple copies, according to equipment available.		
5. Prepared envelopes correctly.		
6. Affixed correct postage.		
7. Completed task within time limit specified.		

*All items must receive acceptable rating.

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display various form letters supplied by local physicians' offices (E4.6.1).
2. Demonstrate production of form letters on the typewriter and/or word processor (E4.6.2, E4.6.3).
3. Demonstrate use of postage meter (E4.6.5).
4. Have students practice preparing form letters and envelopes; set progressively shorter time limits for production until students meet community standard for local physician's offices (E4.6.2-E4.6.5).

SELECTED TOOLS AND MATERIALS

Typewriter/word processor
Form letters
Carbon paper
Postage meter
Instructor's checklist

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Secretarial and Administrative Procedures. Jennings.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.7 Prepare specialized mail, determining appropriate classifications and fees

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PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.7

PERFORMANCE OBJECTIVE

P4.7 Given five pieces of specialized mail, a postage scale, and a U.S. Postal Manual, determine appropriate classification and postage for each and prepare for mailing. All numerical information and calculations must be 100 percent accurate.

SELECTED ENABLING OBJECTIVES

E4.7.1 Determine most appropriate method of sending each piece of mail.

E4.7.2 Using a postage scale, determine postage and fees for:
- a. special delivery
- b. special handling
- c. registered mail
- d. certified mail
- e. insured mail
- f. certificate of mailing.

E4.7.3 Mark, or affix, correct amount of postage.

E4.7.4 Log outgoing mail.

CRITERION-REFERENCED MEASURE

C4.3 Classification and postage for five pieces of specialized mail determined and each prepared for mailing; all numerical information and calculations 100% accurate

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display various pieces of specialized mail, including special delivery, special handling, registered mail, certified mail, insured mail, C.O.D., and certificate of mailing. Discuss uses for each type of mail (E4.7.2).

2. Demonstrate use of postal scale. Have students take turns weighing pieces of mail with the scale (E4.7.2).

3. Prepare practice sheets that contain information about various pieces of mail, and have students determine appropriate classifications and fees for each piece of mail (E4.7.1, E4.7.2).

4. Distribute different pieces of mail to students and have individual students explain the most appropriate way to send each piece (E4.7.1).

5. Have several students prepare a report on current changes in mailing regulations, or changes that may affect the handling of specialized mail (E4.7.2).

6. Provide each student with three or four pieces of mail that should be sent in various specialized categories. Have students determine appropriate classification for each piece, mark correct postage, and log outgoing mail (E4.7.1-E4.7.4).

SELECTED TOOLS AND MATERIALS

Pieces of specialized mail
Postal scale
Practice sheets
Various pieces of mail
Postal publications

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Medical Office Procedures, 2nd ed. Bredow, et al.

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DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.8 Use medical terminology

COURSE

Medical Assistant II (8346)

4.8

PERFORMANCE OBJECTIVE

P4.8 Given worksheets containing medical terms, definitions, abbreviations, prefixes, and suffixes, demonstrate ability to use medical terminology by completing the worksheet with 90% accuracy.

SELECTED ENABLING OBJECTIVES

E4.8.1 Define medical prefixes, suffixes, root words, and combined forms.

E4.8.2 Spell and define medical business terms.

E4.8.3 Supply medical terms for abbreviations and abbreviations for selected medical terms.

E4.8.4 Spell and define terms denoting diseases and conditions.

E4.8.5 Pronounce selected medical terms.

CRITERION-REFERENCED MEASURE

C4.8 Instructor-provided worksheets on medical terms, to be completed with 90% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students keep a notebook of medical terms, including root words, prefixes, suffixes, combined forms, abbreviations, and definitions (E4.8.1-E4.8.4).
2. Prepare flash cards with medical prefixes, suffixes, and abbreviations for student practices in pronunciation and definitions (E4.8.1, E4.8.2, E4.8.5).
3. Dictate terms for practice in spelling and definition (E4.8.2, E4.8.4).
4. Distribute sentences with incorrect medical business terms and have students correct usage and spelling (E4.8.2).
5. Have students prepare posters illustrating terms and definitions related to various diseases and conditions (E4.8.4).
6. Have students practices exercises using medical terminology on the computer (E4.8.1-E4.8.5).

SELECTED TOOLS AND MATERIALS

Instructor-prepared worksheets on medical terminology
Flash cards
Poster supplies
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Medical Office Procedures: Task Analyses, pp. 50-61. Business Education Service, Virginia Department of Education, 1984.

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DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.9 Write problem-oriented medical notes

COURSE

Medical Assistant II (8346)

4.9

PERFORMANCE OBJECTIVE

P4.9 Given specific patient information, write problem-oriented medical notes by assigning numbers to the problems and labeling data subjective or objective with 90% accuracy on a written quiz.

SELECTED ENABLING OBJECTIVES

E4.9.1 Describe objective patient data.

E4.9.2 Describe subjective patient data.

E4.9.3 Demonstrate number assignment to medical problems.

CRITERION-REFERENCED MEASURE

C4.9 Written quiz on problem-oriented medical notes; 90% accuracy required

SELECTED INSTRUCTIONAL ACTIVITIES

1. Demonstrate arrangment of patient information in a problem-oriented form (E4.9.1, E4.9.2).
2. Discuss the differences of objective and subjective patient data and have students practice identifying each (E4.9.1, E4.9.2).
3. Explain and demonstrate assigning numbers to medical problems; assist students as they practice on sample paragraphs of patient information (E4.9.3).

SELECTED TOOLS AND MATERIALS

Sample problem-oriented notes
Instructor-prepared quiz

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Medical Office Administrative Procedures. Frew and Frew.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.10 Collate a patient's chart

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.10

PERFORMANCE OBJECTIVE

P4.10 Given a patient's chart and various records, collate the patient's chart by identifying, explaining the use of, and filing all reports, notes, and forms with 90% accuracy.

SELECTED ENABLING OBJECTIVES

E4.10.1 Name and record information on history form.

E4.10.2 Explain medical questionnaire.

E4.10.3 Identify and file treatment and prognosis notes.

E4.10.4 Identify and file x-ray and consultation reports.

E4.10.5 Identify and file laboratory reports.

E4.10.6 Identify and file consent forms.

E4.10.7 Identify and file prescriptions.

E4.10.8 Define selected medical terminology.

CRITERION-REFERENCED MEASURE

C4.10 Patient's chart collated by identifying, explaining the use of, and filing each part with 90% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Show transparencies of various forms and have students identify each and explain its use (E4.10.1-E4.10.4, E4.10.6, E4.10.7).
2. Have students practice using each form (E4.10.1-E4.10.8).
3. Review applicable medical terminology (E4.10.8).
4. Demonstrate and have students practice collating a simulated patient's chart (E4.10.1-E4.10.8).

SELECTED TOOLS AND MATERIALS

Forms
File folder

SELECTED AUDIOVISUAL MATERIALS

Instructor-prepared transparencies of forms

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Terminology: A Programmed Text, 4th ed. Smith and Davis.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.11 Complete Medicare and Medicaid forms

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.11

PERFORMANCE OBJECTIVE

P4.11 Given patient ledger cards, medical history files, and Medicare and Medicaid claim forms, complete the forms according to agency guidelines. Content must be 100% accurate as verified by ledger cards.

SELECTED ENABLING OBJECTIVES

E4.11.1 Explain Medicare guidelines for form completion.

E4.11.2 Explain Medicaid guidelines for form completion.

E4.11.3 Identify groups eligible for Medicare and Medicaid program assistance.

E4.11.4 Distinguish between Medicare and Medicaid forms.

CRITERION-REFERENCED MEASURE

C4.11 Medicare and Medicaid completed according to agency guidelines; content 100% accurate as verified by patient ledger cards

SELECTED INSTRUCTIONAL ACTIVITIES

1. Invite a guest speaker from Social Security to discuss importance of accuracy in filing claims and the entire claim procedure (E4.11.1, E4.11.2).
2. Display Medicare and Medicaid forms and have students compare (E4.11.4).
3. Present a brief outline of the Medicare and Medicaid programs--the history, the funding, the target populations, and comparison with private health insurance (E4.11.3, E4.11.4).

SELECTED TOOLS AND MATERIALS

Medicare forms
Medicaid forms
Claim information sheet
Patient ledger cards
Medical history file
Selected third-party reimbursement forms (Prucare, Blue Cross, etc.)

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 41. V-TECS.
Medical Office Procedures, 2nd ed. Bredow, et al.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.12 Complete insurance claim forms

----------------Application---------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.12

PERFORMANCE OBJECTIVE

P4.12 Given a patient ledger card, medical history file, and forms for filing insurance claims, complete the insurance forms according to instructions provided. All required information must appear on the form without error, as verified by the patient ledger card.

SELECTED ENABLING OBJECTIVES

E4.12.1 Identify selected insurance forms and carriers.

E4.12.2 Identify and explain information necessary for form completion.

E4.12.3 Describe new trends in private health insurance programs.

E4.12.4 Identify examples of medical services normally not covered by private health insurance.

CRITERION-REFERENCED MEASURE

C4.12 Insurance claim form completed according to instructions; all required information presented without error, as verified by patient ledger card

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display claim forms from several different private health insurance carriers and have students compare information required (E4.12.1, E4.12.2).
2. Invite a guest speaker from a private health insurance company to discuss new trends in this field, such as health maintenance plans, health education, and other efforts to reduce the cost of medical insurance and care (E4.12.3).
3. Have students identify examples of medical services normally not covered by private health insurance (E4.12.4).
4. Have students practice completing forms from various insurance carriers (E4.12.1-E4.12.4).

SELECTED TOOLS AND MATERIALS

Insurance forms
Claim form instruction booklets
Patient chart information

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 40. V-TECS.
Medical Office Procedures, 2nd ed. Bredow, et al.

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DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.13 Complete worker compensation forms

COURSE

Medical Assistant II (8346)

4.13

PERFORMANCE OBJECTIVE

P4.13 Given a patient ledger card, medical history file, and worker compensation forms, complete the claim with 100% accuracy, as verified by the patient ledger card.

SELECTED ENABLING OBJECTIVES

E4.13.1 Describe state regulations regarding worker compensation.

E4.13.2 Identify information necessary from patient medical history.

E4.13.3 Write accurate, concise descriptions of on-the-job accidents.

CRITERION-REFERENCED MEASURE

C4.13 Worker compensation form completed with 100% accuracy as verified by patient ledger card

SELECTED INSTRUCTIONAL ACTIVITIES

1. Explain the purpose of worker compensation as insurance to cover job-related injuries and illnesses (E4.13.1).
2. Display worker compensation forms and discuss information required for form completion (E4.13.2).
3. Have students practice describing various work-related accidents (E4.13.3).

SELECTED TOOLS AND MATERIALS

Worker compensation forms
Patient's ledger card

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredlow.
Medical Assistant, Performance Objective 42. V-TECS.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.14 Complete charge slips

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.14

PERFORMANCE OBJECTIVE

P4.14 Given charge slips, patient files for the day's appointments, and other necessary supplies, process the charge slips with 100% accuracy, as verified by patient chart. At the end of the day, each patient seen must have a charge slip indicating patient's name and address, the date, services rendered, charges incurred, and amount paid.

SELECTED ENABLING OBJECTIVES

E4.14.1 Identify charge slips.

E4.14.2 Describe daily procedure for processing charge slips.

CRITERION-REFERENCED MEASURE

C4.14 Charge slips prepared for the day's patients with 100% accuracy, to include for each patient seen:

a. Patient's name and address
b. Date
c. Services rendered
d. Charges incurred
e. Amount paid

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display charge slips and have students identify information required (E4.14.1).
2. Discuss how the daily charge slip process fits into the billing system as a whole, and relate it to computerized billing (E4.14.2).

SELECTED TOOLS AND MATERIALS

Charge slips
Patient charts
Ledger
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 34. V-TECS.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.15 Complete insurance reimbursement forms

COURSE

Medical Assistant II (8346)

4.15

PERFORMANCE OBJECTIVE

P4.15 Given a patient's file and insurance forms for patient reimbursement, complete the form. All the required information in the doctor's section of the form must be entered without error and verified by the contents of the file.

SELECTED ENABLING OBJECTIVES

E4.15.1 Identify standard American Medical Association (AMA) form.

E4.15.2 Describe components of standard AMA form.

CRITERION-REFERENCED MEASURE

C4.15 Completion without error of doctor's section of insurance reimbursement form, as verified by patient's file

SELECTED INSTRUCTIONAL ACTIVITIES

1. Display insurance reimbursement form and have students identify the information required (E4.15.1).
2. Have students practice completing the physician's section of the form (E4.15.1, E4.15.2).

SELECTED TOOLS AND MATERIALS

Insurance forms for standard AMA claim
Patient chart information

SELECTED AUDIOVISUAL MATERIALS

Instructor-prepared transparency of insurance reimbursement form

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.16 Prepare a bank deposit slip

COURSE

Medical Assistant II (8346)

4.16

PERFORMANCE OBJECTIVE

P4.16 Given an adding machine, a bank deposit slip, and the day's collection of fees, prepare a deposit slip for a simulated physician's office. When completed, all checks must be endorsed and listed on the deposit slip, and coins, currency, and checks totaled without error.

SELECTED ENABLING OBJECTIVES

E4.16.1 Identify banking procedures.

E4.16.2 Identify information required on deposit slip.

E4.16.3 Identify and explain types of check endorsements.

E4.16.4 Demonstrate how to list checks on a deposit slip.

CRITERION-REFERENCED MEASURE

C4.16 Bank deposit slip prepared without error for fees collected in one day in simulated doctor's office

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss banking procedures in general and how banks process checking accounts (E4.16.1).
2. Display deposit slips and have students identify information required, including items that may be preprinted (E4.16.2).
3. Show examples of various types of endorsements and explain the value of restrictive endorsements (E4.16.3).
4. Have students list checks drawn on several different banks, using their identification numbers (E4.16.4).

SELECTED TOOLS AND MATERIALS

Bank deposit slip
Play money
Checks
Adding machine

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Secretarial and Administrative Procedures. Jennings.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.17 Reconcile bank statement

COURSE

Medical Assistant II (8346)

4.17

PERFORMANCE OBJECTIVE

P4.17 Given a calculator, an office check register and bank statement, reconcile the statement. Procedures must be judged acceptable according to instructor-provided checklist.

SELECTED ENABLING OBJECTIVES

E4.17.1 Describe purpose of bank statement reconciliation.

E4.17.2 Define selected banking terminology.

E4.17.3 Outline procedure for reconciling a bank statement.

E4.17.4 Identify examples of errors in the check register which may be discovered through the reconciliation process.

CRITERION-REFERENCED MEASURE

C4.17 Bank statement reconciled according to instructor-prepared checklist; all items rated acceptable

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the purpose of the reconciliation process (E4.19.1).
2. Distribute bank statement reconciliation vocabulary list and have students define terms (E4.19.2).
3. Explain procedures for reconciling statements by displaying forms from several banks. Emphasize that some bank forms reconcile as of the statement date and some allow reconciliation as of the current date (E4.17.3).
4. Discuss common errors in keeping the check register, such as mathematical errors, incorrect balance forwarded, transpositions, or incorrect entries (E4.17.4).

SELECTED TOOLS AND MATERIALS

Reconciliation form
Cancelled checks
Check register
Microcomputer (optional)
Prepared reconciliation problems
Calculator
Vocabulary list
Instructor-prepared checklist

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Office Administrative Procedures. Frew and Frew.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.18 Post payments

COURSE

Medical Assistant II (8346)

4.18

PERFORMANCE OBJECTIVE

P4.18 Given a ledger and charge slips for one day's business, post payments made by simulated patients. Total posted must agree with total amount paid portion of charge slips.

SELECTED ENABLING OBJECTIVES

E4.18.1 Explain procedure for processing charge slips.

E4.18.2 Demonstrate payment collection procedure.

E4.18.3 Explain how the daily ledger is related to the office accounting system and to the billing system.

E4.18.4 Post balances due to patient accounts.

E4.18.5 Explain or demonstrate posting to ledger accounts by computer.

CRITERION-REFERENCED MEASURE

C4.18 Payments posted to daily ledger; total to agree with total amount paid notations on charge slips

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss procedure for collecting payments (E4.18.1).
2. Use a flowchart to illustrate how the daily ledger fits into the total office accounting system (E4.18.3).
3. Demonstrate and have students practice collecting and posting payments (E4.18.1-E4.18.3).
4. Explain the procedure for posting amounts due to patient accounts (E14.18.5).
5. Discuss computerized bookkeeping systems (E4.18.5).

SELECTED TOOLS AND MATERIALS

Play money
Checks
Adding machine/calculator
Account book
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Office Procedures, 2nd ed. Bredow, et al.

DUTY AREA	----------------Application-------------- **PROGRAM**
4. PERFORMING GENERAL OFFICE PROCEDURES	MEDICAL ASSISTANT (17.0503)
TASK/COMPETENCY	**COURSE**
4.19 Initiate collection of delinquent bills	Medical Assistant II (8346)

4.19

PERFORMANCE OBJECTIVE

P4.19 Given predetermined collection policy and 10 simulated overdue accounts, initiate proceedings to collect each delinquent bill. Procedures must be appropriate for age and status of each account, based on the collection policy provided.

SELECTED ENABLING OBJECTIVES

E4.19.1 Describe office collection policy for overdue accounts.

E4.19.2 Determine accounts that need to be collected.

E4.19.3 Demonstrate use of computer in implementing collection policy.

CRITERION-REFERENCED MEASURE

C4.19 Proceedings initiated to collect 10 simulated overdue bills, appropriate for age and status of each account according to collection policy provided

SELECTED INSTRUCTIONAL ACTIVITIES

1. Have students survey various local businesses about their collection procedures and compare with policies of local medical offices (E4.19.1).
2. Outline procedures noted in collection policy for accounts which have been owed for various different periods and for different amounts (E4.19.1).
3. Have students practice classifying accounts as to age and status (E4.19.2).
4. Explain or demonstrate how collection procedures can be aided by a computer (E4.19.3).

SELECTED TOOLS AND MATERIALS

Delinquent accounts
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application----------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.20 Prepare payroll

COURSE

Medical Assistant II (8346)

4.20

PERFORMANCE OBJECTIVE

P4.20 Given time cards, payroll register, and individual earnings records for five employees, prepare payroll by completing payroll register and posting individual earnings records with 100% accuracy.

SELECTED ENABLING OBJECTIVES

E4.20.1 Prepare payroll register, using information on time cards.

E4.20.2 Compute regular hours and overtime hours and calculate overtime rate of pay.

E4.20.3 Compute gross pay.

E4.20.4 Determine deductions and compute net pay.

E4.20.5 Complete payroll register.

E4.20.6 Post to individual earnings record.

E4.20.7 Explain importance of accurate payroll records.

E4.20.8 Explain how a time clock works.

CRITERION-REFERENCED MEASURE

C4.20 Payroll for five employees prepared, 100% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the importance of accurate payroll records (E4.20.7).
2. Demonstrate or explain use of time clock and how to compute regular and overtime hours (E4.20.2, E4.20.7).
3. Demonstrate how to compute overtime rate of pay and compute gross pay (E4.20.2, E4.20.3).
4. Discuss social security taxes, federal and state income taxes, exemptions, and other deductions (E4.20.4).
5. Demonstrate how to complete a payroll register and post to individual earnings record (E4.20.1, E4.20.5, E4.20.6).
6. Have students use practice sets to complete net pay and record payroll (E4.20.1-E4.20.3).

SELECTED TOOLS AND MATERIALS

Time cards
Payroll register
Time clock
Pen
Individual earnings record
Tax deduction guides
Calculator
Payroll practice sets

Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.21 Maintain petty cash fund

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.21

PERFORMANCE OBJECTIVE

P4.21 Given petty cash fund and necessary forms, maintain petty cash fund for one week. Fund must balance at end of week and all additions and withdrawals must be recorded with 100% accuracy.

SELECTED ENABLING OBJECTIVES

E4.21.1 Describe petty cash fund purpose.

E4.21.2 Record withdrawals.

E4.21.3 Record additions.

CRITERION-REFERENCED MEASURE

C4.21 Petty cash fund maintained for one week with 100% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss petty cash fund use (E4.21.1).
2. Have students practice recording withdrawals and additions to fund (E4.21.2, E4.21.3).
3. Have each student maintain fund for one week and balance fund at end of week (E4.21.2, E4.21.3).

SELECTED TOOLS AND MATERIALS

Petty cash box
Play money
Petty cash forms

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.22 Disburse accounts payable

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.22

PERFORMANCE OBJECTIVE

P4.22 Given a set of approved invoices for payment, disburse accounts payable by preparing checks for the appropriate signature and recording checkbook balance with 100% accuracy.

SELECTED ENABLING OBJECTIVES

E4.22.1 Describe components of accounts payable.

E4.22.2 Demonstrate calculator operation.

E4.22.3 Demonstrate or explain how to use a checkwriter.

E4.22.4 Demonstrate or explain how accounts payable are recorded in the journal and in the ledger.

CRITERION-REFERENCED MEASURE

C4.22 Checks prepared for the appropriate signature and balance recorded with 100% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Outline the accounts payable system from purchase order to final payment and posting (E4.22.1, E4.22.4).
2. Review calculator operation and have students work practice problems if needed (E4.22.1, E4.22.4).
3. Display and demonstrate how to use a checkwriter (E4.22.3).
4. Have students write checks and keep a running balance (E4.22.1-E4.22.4).

SELECTED TOOLS AND MATERIALS

Checkbook
Invoices
Calculator
Checkwriter (optional)
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.

----------------Application--------------

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.23 Process incoming mail

COURSE

Medical Assistant II (8346)

4.23

PERFORMANCE OBJECTIVE

P4.23 Given 10 pieces of incoming mail, including checks, patients' histories, insurance forms, medical journals, letters, x-rays, lab reports, and medical samples, process incoming mail by accurately opening, stamping, sorting, and distributing the contents. All items on the instructor's checklist must be rated acceptable.

SELECTED ENABLING OBJECTIVES

E4.23.1 Use the following procedure in opening incoming mail:
  a. open all but "confidential" or personal mail
  b. remove contents
  c. note condition of contents
  d. attach enclosures to letters or other documents which specify enclosures
  e attach envelopes if return address is not included in contents, or if it contains special notations
  f. note if enclosure is missing
  g. log incoming mail, if appropriate.

E4.23.2 Stamp date.

E4.23.3 Sort mail.

E4.23.4 Attach pertinent correspondence.

E4.23.5 Distribute processed mail to mail boxes, individual desks, patient files, laboratories, or other designated locations, as appropriate.

CRITERION-REFERENCED MEASURE

C4.23 10 pieces of incoming mail processed according to instructor's checklist; all items rated acceptable

INSTRUCTOR'S CHECKLIST 4.23

DUTY: PERFORMING GENERAL OFFICE PROCEDURES

TASK: Process incoming mail

ACTIVITY: Open, stamp, sort, and distribute incoming mail

ITEM	RATING*	
	Acceptable	Unacceptable
1. Opened mail without damaging envelope and package contents.		
2. Stamped correct date on mail.		
3. Attached enclosures to letters or documents.		
4. Attached pertinent correspondence.		
5. Sorted mail, with most urgent items on top.		
6. Distributed mail to appropriate locations.		
7. Logged incoming mail, if required by office policy.		

***All items must receive acceptable rating.**

SELECTED INSTRUCTIONAL ACTIVITIES

1. On the chalkboard or on transparencies, outline the steps involved in processing mail and discuss the steps with students (E4.23.1-E4.23.5).
2. Ask students to assist in identifying reasons why proper processing of incoming mail is essential to a medical office (E4.23.1-E4.23.5).
3. Distribute a variety of numbered mail items that would be received in a medical office. Ask students to arrange the items with the most important items at the top. Have students record numbers of sorted items on an answer sheet to simplify checking correctness of sorting (E4.23.3).
4. Illustrate procedures for opening mail without damaging contents of envelopes or packages, and have students practice opening the mail (E4.23.1).
5. Design a project that requires students to open mail, date-stamp it, attach envelopes, locate pertinent correspondence, sort the mail, and distribute it. "Junk" mail received by the school or at home can be used in the project (E4.23.1-E4.23.5).

SELECTED TOOLS AND MATERIALS

Mail items
Date stamp
"Junk" mail
Envelopes and packages

SELECTED AUDIOVISUAL MATERIALS

Transparencies illustrating steps involved in processing incoming mail (instructor-prepared)

SELECTED REFERENCES

Medical Office Procedures, 2nd ed. Bredow, et al.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.24 Prepare purchase order

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.24

PERFORMANCE OBJECTIVE

P4.24 Given a list of supplies, quantities to be ordered, catalogs, and a purchase order form, prepare a purchase order, completing all areas without error.

SELECTED ENABLING OBJECTIVES

E4.24.1 Describe purchasing procedure in the medical office.

E4.24.2 Determine prices of items from supply catalog.

E4.24.3 Explain factors to consider when ordering supplies, such as price, discounts, delivery date, storage capacity, payment policy of supplier, and supply availability.

CRITERION-REFERENCED MEASURE

C4.24 Purchase order prepared with no errors

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute supply house catalogs and have students look up items as directed (E4.24.2).
2. Discuss information required in each part of the purchase requisition form (E4.24.1).
3. Explain procedure and reasons for rotating supplies (E4.24.1).
4. Ask a medical assistant to speak to the class about the purchasing procedure for a local medical office (E4.24.1).
5. Discuss factors to be considered when ordering supplies. Have students look up ordering information in several different suppliers' catalogs and compare (E4.24.4).

SELECTED TOOLS AND MATERIALS

Supply house catalogs
Requisition forms
List of supplies to be ordered

SELECTED AUDIOVISUAL MATERIALS

Transparencies of purchase orders, blank and completed (instructor-prepared)

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.25 Update inventory list

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.25

PERFORMANCE OBJECTIVE

P4.25 Given supply and equipment inventory lists and access to supplies and equipment, update the lists to reflect an accurate count of all supplies and equipment, as compared with the instructor's master inventory list.

SELECTED ENABLING OBJECTIVES

E4.25.1 Explain the importance of maintaining an accurate inventory.

E4.25.2 Explain difference between supply inventory and equipment inventory.

E4.25.3 Identify standard names of supplies and equipment.

E4.25.4 Identify information required to fill out inventory forms.

E4.25.5 Explain procedure for rotating stock.

CRITERION-REFERENCED MEASURE

C4.27 Supply and equipment inventories accurately updated, to agree with instructor's master inventory lists

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the reasons for taking inventory in terms of equipment depreciation and maintenance, stock rotation, and ordering procedures (E4.25.1, E4.25.5).

2. List standard names of all supplies and equipment for ease of identification on inventory (E4.25.3).

3. Display inventory forms and discuss information required (E4.25.2, E4.25.4).

4. Have students take inventory of classroom and laboratory supplies and equipment (E4.25.1-E4.25.5).

SELECTED TOOLS AND MATERIALS

Inventory list forms
Equipment and supplies to be inventoried
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Transparencies of inventory forms, blank and completed (instructor-prepared)
Software: See Appendix

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Office Administrative Procedures. Frew and Frew.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.26 Transcribe dictated medical records

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.26

PERFORMANCE OBJECTIVE

P4.26 Given recorded dictation and typewriter, transcribe two medical records. Terminology, spelling, punctuation, word division, and style must be 100% accurate, with all typing errors neatly corrected.

SELECTED ENABLING OBJECTIVES

E4.26.1 Name and type parts of medical records.

E4.26.2 Type progress notes for patient's chart from dictation.

E4.26.3 Explain confidentiality of contents.

E4.26.4 Demonstrate how to use dictating equipment.

E4.26.5 Demonstrate proofreading skills.

E4.26.6 Demonstrate how to correct typing errors.

CRITERION-REFERENCED MEASURE

C4.28 Two medical records transcribed with 100% accuracy; all typing errors neatly corrected

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss parts of medical record (E4.26.1).
2. Demonstrate typing of progress notes from dictation (E4.26.2, E4.26.3).
3. Invite a medical doctor to talk to the class on the physician's evaluation of progress notes (E4.26.2, E4.26.3).
4. Have students practice using dictation equipment, listening for corrections made by the speaker and backing the machine up to catch parts that are unclear (E4.26.4).
5. Give students transcribed copy for proofreading and error correction practice (E4.26.5, E4.26.6).
6. Discuss the confidentiality of medical records in terms of the concept of medical ethics and the role of the medical assistant (E4.26.3).
7. Have students transcribe records and display those that are exemplary (E4.26.2-E4.26.6).

SELECTED TOOLS AND MATERIALS

Typewriter
Progress note paper
Dictation machine and tape
Consultation notes, history, and physical examination notes to be transcribed

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Business Administration for the Medical Assistant. Hall and Yenerich.
The Medical Assistant, 4th ed. Cooper and Bredow.

DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

TASK/COMPETENCY

4.27 Maintain medical records file

----------------Application----------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

4.27

PERFORMANCE OBJECTIVE

P4.27 Given letters, diagnostic reports, progress notes, and the necessary supplies, maintain a medical records file by filing all the items in the patient's folders according to established office policy. Each item must be indexed, coded, and cross-referenced where appropriate and placed in the proper file, and each file must be returned to its proper space. Procedure must be accomplished with no errors.

SELECTED ENABLING OBJECTIVES

E4.27.1 Describe alphabetic and numeric filing systems.

E4.27.2 Identify components of a patient's file.

E4.27.3 Index and code selected documents.

E4.27.4 Demonstrate cross-referencing system.

E4.27.5 Demonstrate sorting procedure.

E4.27.6 Prepare a medical file for a new patient.

E4.27.7 Enter patient account data into computerized system.

CRITERION-REFERENCED MEASURE

C4.27 Medical records file maintained with no errors:

a. Each item indexed, coded, and cross-referenced as appropriate
b. Each item placed in patient's file
c. Each file returned to its proper space

SELECTED INSTRUCTIONAL ACTIVITIES

1. Explain various filing methods, emphasizing alphabetic and numeric (E4.27.1)
2. Discuss and demonstrate how to set up a new patient's file and show how items commonly included are sorted and added to the file. Have students identify each item as it is added (E4.27.2, E4.27.6).
3. Distribute cards listing each student's name and social security number and have students sort cards according to various filing systems (E4.27.5).
4. Explain file codes used in local medical offices to facilitate cross-referencing; have students practice using an established system (E4.27.3, E4.27.4).
5. Demonstrate how to set up a new patient account, using a computerized bookkeeping system if available (E4.27.7).

SELECTED TOOLS AND MATERIALS

File folders
Reports
Letters
Lab reports
X-rays
EKG graphs
Progress notes
Personal information forms
Charge slips
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Business Administration for the Medical Assistant. Hall and Yenerich.

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DUTY AREA

4. PERFORMING GENERAL OFFICE PROCEDURES

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

4.28 Complete annual federal narcotics report

COURSE

Medical Assistant II (8346)

4.28

PERFORMANCE OBJECTIVE

P4.28 Given forms, narcotics inventory record, and simulated stock supply of controlled substances, prepare the annual narcotics report with 100% accuracy. Completed report must show the exact amount of all narcotics purchased and dispensed during the year and the exact amount on hand.

SELECTED ENABLING OBJECTIVES

E4.28.1 Identify federal and state laws governing use of narcotics and controlled substances.

E4.28.2 Maintain drug inventory record.

E4.28.3 Describe narcotics controls in the physician's office.

E4.28.4 Demonstrate computerized inventory system.

CRITERION-REFERENCED MEASURE

C4.28 Federal annual nacrotics report completed with 100% accuracy, showing exact amounts of controlled substances purchased and dispensed and exact amount on hand

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss federal laws governing use of narcotics and controlled substances (E4.28.1, E4.28.3).
2. Explain how drug inventory records are kept (E4.28.1, E4.28.3).
3. Display and demonstrate how to fill out federal report form (E4.28.1, E4.28.3).
4. Have students survey various physicians' offices to determine security measures for controlled substances (E4.28.3).
5. Have students enter drug stock on computer and practice maintaining the inventory (E4.28.4).

SELECTED TOOLS AND MATERIALS

Drug inventory records
Federal report forms
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

The Medical Assistant, 4th ed. Cooper and Bredow.
Medical Assistant, Performance Objective 43. V-TECS.

DUTY AREA

5. DEVELOPING EMPLOYABILITY SKILLS

TASKS/COMPETENCIES

5.1 Participate in in-class student organization activities

5.2 Define medical practice acts and describe legal responsibilities of medical personnel

5.3 Prepare a resume

5.4 Complete a job application form

5.5 Participate in a simulated job interview

DUTY AREA

5. DEVELOPING EMPLOYABILITY SKILLS

TASK/COMPETENCY

5.1 Participate in in-class student organization activities

---------------Application---------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant I (8345)
Medical Assistant II (8346)

5.1

PERFORMANCE OBJECTIVE

P5.1 Given appropriate information on the goals, objectives, and activities of Health Occupations Student of America (HOSA), participate in in-class HOSA activities according to the organization's guidelines. Participation is evaluated on a periodic basis and must be rated acceptable according to instructor-prepared checklist based on the activity.

SELECTED ENABLING OBJECTIVES

E5.1.1 Describe goals, objectives, and activities of HOSA.

E5.1.2 Identify officer titles and their duties.

E5.1.3 Demonstrate parliamentary procedure.

E5.1.4 Nominate and elect HOSA officers.

E5.1.5 Assist in establishing a planned list of activities.

CRITERION-REFERENCED MEASURE

C5.1 Participation in in-class HOSA activities according to organization guidelines; evaluation on a periodic basis, rated acceptable according to instructor-prepared checklist based on the activity

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute HOSA information sheets and discuss goals, activities, and objectives of the organization (E5.1.1).
2. Have students prepare oral reports of duties of each officer (E5.1.2).
3. Conduct a leadership seminar (E5.1.3).
4. Supervise demonstration and practice of parliamentary procedure for a business meeting and election of officers (E5.1.3, E5.1.4).
5. Have students nominate and elect officers and vote on planned activities using parliamentary procedure (E5.1.4, E5.1.5).

SELECTED TOOLS AND MATERIALS

Gavel
Posters of HOSA seal and goals
HOSA information sheets

SELECTED AUDIOVISUAL MATERIALS

None identified

SELECTED REFERENCES

Robert's Rules of Order Newly Revised. Robert.
Virginia Advisor's HOSA Manual. Health Occupations Education Service.

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DUTY AREA

4. DEVELOPING EMPLOYABILITY SKILLS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

5.2 Define medical practice acts and describe legal responsibilities of medical personnel

COURSE

Medical Assistant II (8346)

5.2

PERFORMANCE OBJECTIVE

P5.2 Given a list of various medical practice acts, define each and describe the legal responsibilities of medical personnel under these acts with 80% accuracy on a written test.

SELECTED ENABLING OBJECTIVES

E5.2.1 Describe selected components of the medical practice acts.

E5.2.2 Identify the Harrison Narcotic Act and the substances controlled.

E5.2.3 Explain the Good Samaritan Act.

E5.2.4 Describe the Patient's Bill of Rights.

E5.2.5 List situations in which the physician is required to report to proper legal authority.

E5.2.6 Describe duties and responsibilities of the medical assistant.

CRITERION-REFERENCED MEASURE

C5.2 Written test on medical practice acts and legal responsibilities of medical personnel, 80% accuracy

SELECTED INSTRUCTIONAL ACTIVITIES

1. Show filmstrip and discuss legal responsibilities related to controlled substances (E5.2.2, E5.2.5, E5.2.6).
2. Discuss various acts, duties, and responsibilities of the medical assistant (E5.2.6).
3. Provide students with oral practice in making decisions involving ethical and legal matters when presented with a described situation (E5.2.5, E5.2.6).
4. Invite an attorney whose practice involves medical malpractice to speak to the class about the rights and responsibilities of medical personnel and patients (E5.2.1, E5.2.3, E5.2.4).

SELECTED TOOLS AND MATERIALS

Instructor-prepared test

SELECTED AUDIOVISUAL MATERIALS

Filmstrip: Narcotics, The Law, and You. Gould Educational Systems, Inc., 4423 Arden Drive, El Monte, California 91731.

SELECTED REFERENCES

American Association of Medical Assistants Bylaws.
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The Medical Assistant, 4th ed. Cooper and Bredow.
Practioners Information Outline of the Controlled Substance Act of 1970. U.S. Department of Justice.

DUTY AREA

5. DEVELOPING EMPLOYABILITY SKILLS

TASK/COMPETENCY

5.3 Prepare a resume

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

5.3

PERFORMANCE OBJECTIVE

P5.3 Given a completed sample and necessary materials, prepare a personal resume that includes all components contained in the sample provided. Resume must be typed in accepted format, with all errors neatly corrected.

SELECTED ENABLING OBJECTIVES

E5.3.1 Define resume and list reasons for its preparation.

E5.3.2 Describe the major components of a resume: personal information, education, work experience, and references.

E5.3.3 Illustrate accepted formats for a personal resume.

E5.3.4 Explain procedure for listing references on a resume.

CRITERION-REFERENCED MEASURE

C5.3 Resume typed in accepted format with all errors neatly corrected, to include all components contained in sample provided

SELECTED INSTRUCTIONAL ACTIVITIES

1. Distribute sample resumes and discuss formats and methods of presenting information (E5.3.1, E5.3.3).
2. Explain the major components included on most resumes. Emphasize that younger job-seekers include more information on education and school activities unless their work experience is directly related (E5.3.2).
3. Illustrate ways of presenting personal, educational, and employment history accurately but in the most positive manner possible (E5.3.2).
4. Ask a local employer to speak to the class about the impression created by neat, concise, properly worded resumes (E5.3.1-E5.3.3).
5. Discuss with students how to select people to list as references and stress the importance of obtaining permission prior to listing (E5.3.4).

SELECTED TOOLS AND MATERIALS

Paper (lined and typing)
Pen and pencil
Typewriter
Correction materials
Instructor-prepared samples of resumes
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

EFE/WECEP Instructional Materials Manual, Pre-Employment Unit. Virginia Department of Education.

---------------Application--------------

DUTY AREA

5. DEVELOPING EMPLOYABILITY SKILLS

PROGRAM

MEDICAL ASSISTANT (17.0503)

TASK/COMPETENCY

5.4 Complete a job application form

COURSE

Medical Assistant II (8346)

5.4

PERFORMANCE OBJECTIVE

P5.4 Given a sample job application form for a medical assistant position, complete the application according to instructions on the form. Information must be printed neatly and legibly. All blanks must be filled in, and there must be no spelling or grammatical errors.

SELECTED ENABLING OBJECTIVES

E5.4.1 Explain the function of a job application form.

E5.4.2 Define the components of a job application.

E5.4.3 Explain the importance of following instructions on a job application form.

CRITERION-REFERENCED MEASURE

C5.4 Job application form completed according to instructions on the form; information printed neatly and legibly; all blanks filled in; and no spelling or grammatical errors

SELECTED INSTRUCTIONAL ACTIVITIES

1. Discuss the function of a job application form as a screening tool for the employer. Stress those impressions an employer can form about the applicant's ability to follow instructions, attention to detail, communication skills, and work attitude (E5.4.1, E5.4.3).

2. Distribute job applications and discuss each component. Explain that applicants should enter N/A in blanks that are not applicable to them so the employeer knows that they read and understood the question (E5.4.2).

3. Help students develop appropriate wording for various information such as previous job duties and reasons for leaving (E5.4.2).

SELECTED TOOLS AND MATERIALS

Pen
Sample job application forms
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

EFE/WECEP Instructional Materials Manual, Pre-Employment Unit. Virginia Department of Education.

DUTY AREA

5. DEVELOPING EMPLOYABILITY SKILLS

TASK/COMPETENCY

5.5 Participate in a simulated interview

----------------Application--------------

PROGRAM

MEDICAL ASSISTANT (17.0503)

COURSE

Medical Assistant II (8346)

5.5

PERFORMANCE OBJECTIVE

P5.5 Given guidelines on how a job interview is conducted, participate in a simulated personal job interview for a medical assistant position. Performance must be rated acceptable according to instructor's checklist.

SELECTED ENABLING OBJECTIVES

E5.5.1 Explain the importance of promptness in a job interview situation.

E5.5.2 Differentiate between a professional and nonprofessional appearance in a job interview.

E5.5.3 Describe information an applicant might need to convey or receive during an interview.

E5.5.4 Explain the importance of gathering information about a potential position or employer before attending an interview.

E5.5.5 Describe how a positive attitude and self-confidence can be conveyed in an interview situation.

E5.5.6 Prepare follow-up correspondence to be sent to the interviewer.

CRITERION-REFERENCED MEASURE

C5.5 Simulated job interview complete; performance rated acceptable according to instructor's checklist

INSTRUCTOR'S CHECKLIST 5.5

DUTY: DEVELOPING EMPLOYABILITY SKILLS

TASK: Participate in a simulated job interview

ACTIVITY: Participate in a simulated job interview for a medical assistant

ITEM	RATING*	
	Acceptable	Unacceptable
1. Introduced self correctly.		
2. Presented appropriate and accurate information.		
3. Gave brief but complete answers.		
4. Spoke slowly and clearly enough to be understood.		
5. Obtained necesary job information from the interviewer.		
6. Kept eye contact with the interviewer throughout the interview.		
7. Presented a positive attitude.		
8. Showed poise and self-confidence.		
9. Displayed no distracting mannerisms.		
10. Thanked the interviewer at the completion of the interview.		
11. Completed follow-up correspondence.		

***All items must receive acceptable rating.**

SELECTED INSTRUCTIONAL ACTIVITIES

1. Lead a discussion on how an applicant can present a professional appearance at a job interview through promptness; appropriate dress; politeness; and clear, well modulated speech (E5.5.1, E5.5.2).

2. Assist students in identifying questions they may be asked during an interview and questions they may wish to ask. Emphasize the benefits of some prior knowledge of the employer so applicants can ask relevant questions (E5.5.3, E5.5.4).

3. Demonstrate examples of poise and self-confidence in an interview situation through speech and body language. Emphasize to students that the job applicant has valuable skills and talents to offer and that the job interview should be conducted in an atmosphere of mutual respect (E5.5.5).

4. Have students write letters thanking the interviewer for the opportunity to discuss potential employment. Explain that this is an important step in the job application process and that it reinforces the good impression presented at the interview (E5.5.6).

SELECTED TOOLS AND MATERIALS

Instructor-prepared job interview guidelines
Instructor's checklist
Microcomputer (optional)

SELECTED AUDIOVISUAL MATERIALS

Software: See Appendix

SELECTED REFERENCES

EFE/WECEP Instructional Materials Manual, Pre-Employment Unit. Virginia Department of Education.

SECTION 2

PROGRAMS AND COURSES

Medical Assistant is one of several occupational preparation program options which follow a strongly recommended prerequisite year of study in Introduction of Health Occupations (VA 8302). To meet individual students' occupational objectives of employment in physician's offices or clinics, emphasis is placed on a combination of classroom instruction and on-the-job clinical practice in a local health care facility. On-the-job experiences are coordinated by the health occupations instructor.

The first part of this section consists of a description of the Medical Assistant program. The second part of this section includes descriptions of the specific courses Medical Assistant I and II, which are based on the task inventory in Section 1 and which are approved by the Virginia Department of Education. A suggested teaching sequence is provided for the tasks applicable to each course, along with a content outline. The content outline has been cross-referenced with the task inventory sheets to assist the instructor in identifying instructional objectives and materials, criterion standards, and reference materials.

SECONDARY PROGRAM AND COURSES

PROGRAM TITLE:	MEDICAL ASSISTANT
DESCRIPTION:	Medical Assistant is a two-year instructional program that prepares students to assist a physician by performing functions related to both business administration and clinical duties of a medical office. Business aspects of instruction cover insurance, accounts, reports, medical records, and medical transcription. Clinical aspects of study include preparation of the patient for examination, assessment of vital signs, assistance with medical examination and treatment, routine laboratory procedures, and use of the electrocardiograph machine.
CIP CODE:	17.0503
SUGGESTED GRADE LEVELS:	11-12

APPROVED COURSE	VA CODE CODE	DOT CODE/TITLE
Medical Assistant I	8345	
Medical Assistant II	8346	079.367-010 Medical Assistant

It should be noted that students may also gain the knowledge and skills necessary for employment as a medical assistant through enrollment in the Health Careers Cluster (CIP code 17.0299) and choosing the medical occupational track in the Health Assistant II course (VA 8332).

MEDICAL ASSISTANT I (8345)

Description and Sequence

Course Description:	Medical Assistant I is a double-period occupational preparation course offered at the eleventh-grade level. The student studies body structure and function, principles of health, and microbes and disease. Development of basic skills and techniques of assisting the the physician in the following areas are emphasized: receptionist duties, assisting with patient examinations, cardiopulmonary resuscitation, and performance of simple laboratory tests. On-the-job clinical instruction occurs in physician offices or clinics and is coordinated by the health occupations teacher.
Prerequisite:	Introduction to Health Occupations (8302) recommended
Suggested Grade Level:	11

Task/Competency Sequence

3.1 Wash hands
3.2 Don sterile gloves
3.3 Sterilize materials, using the steam autoclave
3.4 Open sterile package and place items on a sterile field
2.1 Demonstrate safe body mechanics
2.2 Measure and record vital signs
2.3 Measure and record height and weight
2.4 Drape and position patient for examinations
2.5 Perform visual screening tests
2.6 Collect urine specimens and perform selected tests
2.7 Assist with collection of microorganism smears
2.8 Collect capillary blood specimen and perform selected hematology tests
2.10 Prepare examination room for minor surgery
1.1 Initiate first aid procedures in common emergencies
1.2 Apply bandages
1.3 Administer first aid for choking
1.4 Administer aid for cardiac arrest
1.5 Administer first aid for musculoskeletal injury
4.1 Place and receive telephone calls
4.2 Receive patients and visitors
5.1 Participate in in-class student organization activities (on-going activity)

MEDICAL ASSISTANT I (8345)

Content Outline	Task/Competency Code
I. APPLYING ASEPTIC TECHNIQUES	
A. Handwashing procedure	P3.1
B. Sterile gloving procedure	P3.2
C. Autoclave operation	P3.3
D. Handling of sterile packages and items	P3.4
II. ASSISTING WITH PHYSICAL EXAMINATIONS	
A. Body mechanics	P2.1
B. Vital signs	P2.2
C. Height and weight measurement	P2.3
D. Draping and positioning of patient for examination	P2.4
E. Visual screening test	P2.5
F. Urine collection and tests	P2.6
G. Microorganism smear collection	P2.7
H. Hematology tests	P2.8
I. Preparation for minor surgery	P2.9
III. PERFORMING EMERGENCY PROCEDURES	
A. First aid for common emergencies	P1.1
B. Bandage applications	P1.2
C. First aid for choking	P1.3
D. Aid for cardiac arrest	P1.4
E. First aid for musculoskeletal injury	P1.5
IV. PERFORMING GENERAL OFFICE PROCEDURES	
A. Telephone techniques	P4.1
B. Patient/visitor reception	P4.2
V. DEVELOPING EMPLOYABILITY SKILLS	
Student organization activities	P5.1

MEDICAL ASSISTANT II (8346)

Description and Sequence

Course Description: Medical Assistant II is a triple-period occupational preparation course offered at the twelfth-grade level. Medical assisting skills and techniques learned in Medical Assistant I are further developed. Instruction is also provided in medical economics; assembly and maintenance of patient records; care of equipment; special diagnostic testing such as electrocardiogram; and assistance with office therapy. On-the-job experience in physician offices or clinics is a part of the course. Successful completion of the program leads to employment in physician offices or clinics. Typewriting 6151 is recommended.

Prerequisite: Medical Assistant I

Suggested Grade Level: 12

Task/Competency Sequence

1.3 Administer first aid for choking
1.4 Administer aid for cardiac arrest
2.9 Prepare patient for heart and respiratory function measurements
2.11 Demonstrate microbiological examination techniques
4.3 Maintain an appointment book
4.4 Compose business letters
4.5 Type business letters
4.6 Prepare form letters for mailing
4.7 Prepare specialized mail, determining appropriate classifications and fees
4.8 Use medical terminology
4.9 Write problem-oriented medical notes
4.10 Collate a patient's chart
4.11 Complete Medicare and Medicaid forms
4.12 Complete insurance claim forms
4.13 Complete worker compensation forms
4.14 Complete charge slips
4.15 Complete insurance reimbursement forms
4.16 Prepare bank deposit slip
4.17 Reconcile bank statement
4.18 Post payments
4.19 Initiate collection of delinquent bills
4.20 Prepare payroll
4.21 Maintain petty cash fund
4.22 Disburse accounts payable
4.23 Process incoming mail
4.24 Prepare purchase order
4.25 Update inventory list
4.26 Transcribe dictated medical records

4.27 Maintain medical records file
4.28 Complete annual federal narcotics report
5.1 Define medical practice acts and describe legal responsibilities of medical personnel
5.3 Prepare a resume
5.4 Complete a job application form
5.5 Participate in a simulated job interview

MEDICAL ASSISTANT II (8346)

Content Outline	Task/Competency Code
I. PERFORMING EMERGENCY PROCEDURES	
A. First aid for choking (review)	P1.3
B. Cardiopulmonary resuscitation (advanced)	P1.4
II. ASSISTING WITH PHYSICAL EXAMINATION	
A. Heart and respiratory function measurements	P2.9
B. Microbiological examination techniques	P2.11
III. PERFORMING GENERAL OFFICE PROCEDURES	
A. Appointment scheduling	P4.3
B. Business letter composition	P4.4
C. Business letter preparation	P4.5
D. Form letters	P4.6
E. Specialized mail	P4.7
F. Medical terminology	P4.8
G. Problem-oriented medical notes	P4.9
H. Patient chart collation	P4.10
I. Medicare/Medicaid forms	P4.11
J. Insurance claim forms	P4.12
K. Worker compensation forms	P4.13
L. Charge slips	P4.14
M. Insurance reimbursement forms	P4.15
N. Bank deposits	P4.16
O. Bank statement reconciliation	P4.17
P. Payment posting procedure	P4.18
Q. Delinquent bill collection	P4.19
R. Payroll preparation	P4.20
S. Petty cash fund	P4.21
T. Accounts payable disbursement	P4.22
U. Incoming mail	P4.23
V. Purchase orders	P4.24
W. Inventory records	P4.25
X. Medical record transcription	P4.26
Y. Medical records file	P4.27
Z. Annual federal narcotics report	P4.28
IV. DEVELOPING EMPLOYABILITY SKILLS	
A. Student organization activities (on-going)	P5.1
B. Medical ethics and legal responsibilities	P5.2
C. Resume preparation	P5.3
D. Job application procedures	P5.4
E. Job interview simulation	P5.5

BIBLIOGRAPHY

The development of this guide was based on textbooks and resources in use at the time in the Newport News Public Schools. The following list (part I) outlines bibliographic information for each publication. However, more current references are available and some texts have been updated since the guide was written. A list of these references appears in Part II of the bibliography.

Part I. Publications Used in Guide Development

American Association of Medical Assistants Bylaws. Chicago: American Association of Medical Assistants, 1982.

American Red Cross CPR Module--Respiratory and Circulatory Emergencies. American Red Cross, 1980.

American Red Cross Emergency First Aid Module. American Red Cross.

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Business Education Service. Medical Office Procedures: Task Analyses. Richmond: Virginia Department of Education, 1984.

Carolina Human Blood Pressure Manual. Carolina Biological Supply, 1981.

Catalog of Performance Objectives, Criteria-Referenced Measured, and Performance Guides for Medical Assistant. Kentucky: Vocational-Technical Education Consortium of States, 1978.

Collection, Handling, and Shipment of Microbiological Specimens. Atlanta: Centers for Disease Control, 1973.

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Current Opinions of the Judicial Council. Chicago: American Medical Association, 1982.

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Health Occupations Education Service. Virginia Advisor's HOSA Manual. Richmond: Virginia Department of Education.

Human Vision. The Carolina Natural Science Series. Carolina Biological Supply, 1980.

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Oppenheim, I. Textbook for Laboratory Assistants, 3rd ed. St. Louis: The C.V. Mosby Co., 1981.

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APPENDIX

INFORMATION AND RESOURCES

I. References

The following additional references have been identified as useful in implementing a competency-based program in Medical Assistant.

The Anatomy Coloring Book. Kapit and Elson. Harper & Row, 1977.

Basic Medical Terminology. Fisher. Books-Merrill Educational Publishing, 1978.

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Microbiology for Health Careers, 2nd ed. Ferris. Delmar Publishers, 1982.

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The Three Boxes of Life and How to Get Out of Them. Richard N. Balles. Ten Speed Press.

Understanding Human Behavior. M.E. Milliken. Delmar, 1981.

Where Do I Go From Here With My Life? Richard N. Balles and John C. Crystal. Ten Speed Press.

Winning Ways With Patients. American Medical Association, 1979.

Work Values for Today's Youth. Curry and Crosen. Division of Vocational and Technical Education, Virginia Polytechnic Institute and State University, 1978.

II. Software

Computer software in many areas of vocational education, particularly in Business Education, is being developed at such a rapid rate that any list is bound to be incomplete. Selection for secondary health education competencies is much more limited. The following list contains some software titles pertinent to instruction in the Medical Assistant program. Teachers should contact their local computer resource specialist to determine the applicability of particular software to their classroom, and should screen any software carefully according to the learning needs and abilities of their students.

For further information, refer to Microcomputer Applications in Secondary Health Occupations Education: The State of the Art, which includes a taxonomy of health education-related software as of late 1984. Teachers may also take advantage of the free nationwide computer search service available through the Virginia Vocational Curriculum Center. In some cases, software listed on this network of databases has been evaluated according to grade and learning levels and applicability to particular classroom situations. For further information, contact the Virginia Vocational Curriculum Center, 2200 Mountain Road, Glen Allen, Virginia 23060-2208; telephone (804) 262-7439.

Duty Area 1: Performing Emergency Procedures

A. Learning Technologies, 25041 Mackenzie, Laguna Hills, CA 92653

Bleeding
Choking
CPR
Fractures
Introduction to First Aid
Shock
Wounds

B. Bits and Bytes, Fenner Block, 33 Church Street, Fredonia, NY 14063

Basic First Aid

C. Dorsett Educational Systems, P.O. Box 1226, Norman, OK 73070

First Aid & Safety

Duty Area 2: Assisting With Physical Examinations

A. Avant-Garde Creations, P.O. Box 30160, Eugene, OR 97403.

The Heart

B. Learning Technologies, 25041 Mackenzie, Laguna Hills, CA 92653

The Respiratory System
The Skeletal System

C. Educational Activities, Inc., 1937 Grand Avenue, Baldwin, NY 11510

Heart Lab: Simulation Model of the Human Heart

D. Micro Power & Light, 12820 Hillcrest Road, Suite 224, Dallas, TX 75230

Circulation System
Reproductive Organs

Duty Area 4: Performing General Office Procedures

A. ABT Microcomputer Software, 55 Wheeler Street, Cambridge, MA 92138

Medical Office Manager

B. Charles Mann & Assoc., 55722 Santa Fe Trail, Yucca Valley, CA 92284
Medical Office Management I
Medical Office Management II
Medical Office Management IIC

C. Applied Microsystems, P.O. Box 832, Roswell, GA 30077

Elements of Medical Terminology

D. American Peripherals (contact local Commodore dealer)

High School Medical Terminology

E. Curriculum Publications Clearinghouse, Western Illinois University, 47 Horrabin Hall, Macomb, Il 61455

Business Programs for Apple II

F. Micro Learningware, P.O. Box 2134, North Mankato, MN 56001

Business Ed. Package I
Business Ed. Package II
Punctuation

G. Computations, P.O. Box 502, Troy, MI 48099

Typing Teacher

H. Microsoft Consumer Products, 400 180th Avenue NE, Bellevere, WA 98004

Typing Tutor

I. Radio Shack, One Tandy Center, Fort Worth, TX 76102

Accounts Payable
Accounts Receiveable
Business Checkwriter
General Ledger
Inventory
Numeric Data Entry Practice
Order Entry
Payroll
Complete Checkbook Maintenance
Mailing List II

J. Spectrum Software (contact local Apple Dealer)

General Ledger

K. South-Western Publishing Company, 5010 Madison Road, Cincinnati, OH 45227

Automated Accounting for Microcomputer
Data Entry Activities for Microcomputers

Duty Area 5: Developing Employability Skills

A. Aquarius Software, Inc., P.O. Box 128, Indian Rocks Beach, FL 33535

How to Get and Hold a Job
The Job and You
Self-Concept and Your Work
New on the Job
Interviewing

B. Microcomputer Educational Programs, Inc., 157 S. Kalamazoo Mall, Kalamazoo, MI 49007

Job Readiness: Assessment and Development
Job Readiness: Attitude Assessment
Filling Out Job Applications
Successful Job Interviewing
Resources for Job Hunting
Personal Habits for Job Success
Work Habits for Job Success
First Day on the Job

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